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The linkages between social protection  
and migration: a case study of  
*Oportunidades* and migration in  
Oaxaca, Mexico

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Doctoral Thesis

PhD in International Development

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I hereby declare that this thesis has not been and will not be submitted in whole or in part to another University for the award of any other degree.

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UNIVERSITY OF SUSSEX

CARMEN GUADALUPE LEÓN HIMMELSTINE

PHD IN INTERNATIONAL DEVELOPMENT

THE LINKAGES BETWEEN SOCIAL PROTECTION AND MIGRATION: A CASE STUDY OF *OPORTUNIDADES* AND MIGRATION IN OAXACA, MEXICO

This research encompasses the fields of social protection and migration through an empirical study of the Mexican conditional cash-transfer (CCT) programme, *Oportunidades*, in two indigenous locations. The thesis looks at the way(s) in which *Oportunidades* and migration, both international and domestic, influence each other.

It focuses on the decision to migrate of individuals – in particular of former and current beneficiaries of the programme – and offers a methodological approach that is different to previous studies on this topic. The thesis employs both qualitative and ethnographic data on the mutual effects of CCTs and migration through multi-sited research covering the high region of the *Mixes* in Oaxaca, Oaxaca City and Mexico City, and in California, USA.

The results show that:

- the outcome of the influence of *Oportunidades* on the decision to migrate is very dependent on contextual variables, mainly the migration situation in each village, the social and cultural norms around the purpose and meaning of migration, and the circumstances of beneficiaries' households. The outcome of *Oportunidades* was mediated by what the individual household and community considered as the means to achieve social mobility, which differed across the two main localities of study;
- the allocation of remittances, both international and internal, had an influence not only on the households but also on the norms and values of the society more broadly, through the annual *cargos* or local-council elections and the aspirations of beneficiaries; and finally that
- the transition from more years of education to skilled jobs, as expected by *Oportunidades*, is not straightforward. This thesis explores how these transitions take place in reality and the different meanings and paths to social mobility they have for beneficiaries.

UNIVERSITY OF SUSSEX

CARMEN GUADALUPE LEÓN HIMMELSTINE

PHD IN INTERNATIONAL DEVELOPMENT

MÄÄ NYAYPÄÄTYİYİ JA PUTĖJKĪN MITI' JA MĖJ KUTUNK KYAJXTĖP MĖĖT JA TSOO'NJĖ'KK: EJXĪN KOO'ĪN MÄÄ JA MEENYPĖJKK MITI' YYĪKXĖMĖĖPY *OPORTUNIDADES* JĪTS JA TSOO'NJĖ'KK WÄJKWEMPĪT KÄJP, NĖWIINY.

Ja putĖjkĪn miti' ja mĖj kutunk kyajxtĖp jĪts ja tsoo'njĖ'kk yä'ätt pee'Īn koo'nĪn tyunk'ajtpy mää tĖ yyĪk'ijxy yyĪkkĖy majtsk käjpkijxy ku ja NĖwempĪt putĖjkĪn jyä'äty, ejxĪm ja meenypĖjkk miti' yyĪkxĖmĖĖpy *Oportunidades*. Ja'ts yä'ät nĖky nyĪmatyakpy sutsoo ja *Oportunidades* jĪts ja tsoo'njĖ'kk, Ėy wĪnkon uk jakam, nyaypäätyiyĪtĖ nyaypikyiyĪtĖ tum jate'n.

Ja'ts yĖ' nyĪmatyakpy jatijts jĪte'n ja jää'y tsyoo'njĖ'knĪtĖ – ja'tĖ pĖn yĖ'pĖ putĖjkĪn ijty pyĖjktĖp jĪts pĖn yämnĪm pyĖjktĖp – jĪts tĪkatsy ja wĪnmää'ny tpĪktä'äky sää ja tunk pĖjkk tyuu'yĖ'Ėyy, ka' nay jate'n sää muum jĖ wenkpĖ nay yä'tpĖ wĪnmää'ny tĖ ttunk'ättĖ. Ja'pĖ pee'Īn koo'nĪn yä'ät nĖky yyĪktunpy miti' yyĪkmatsyootäkp jĪts miti' ja jujky'äjtĪn nyĪmatyakpy ku yyĪknĪmatyā'äk sääjaty jĪte'n ja putĖjkĪn jĪts ja tsoo'njĖ'kk tyĪktĪkatsy tu'uk jatu'uk ja käjp jĖ tsyĖnää'yĪn tyanää'yĪn määjaty yä'ät tunk pĖjkk tĖ tyuu'yĖ'Ėyy jam ayuujk käjp etjotp, Wäjkwemp, NĖwemp jĪts California, jajp Estados Unidos.

Tii wĪnkĪtäkp:

- ka' yĖ *Oportunidades* tum jate'n tyĪktĪkatsy ja tsoo'njĖ'kk wĪnmää'ny, tĪkäjtsp sääjaty kĖ'm ja tsoo'njĖ'kk wĪnmää'ny yyĪkmĖĖt'aty, sääjaty ja tsyĖnää'yĪn tyanää'yĪn tyĪknäxtĖ jam jyĖĖnjotp tyĖjkjotp pĖnjaty yĖ'pĖ putĖjkĪn pyĖjktĖp. KĖ'm ja jää'y tĖ tyĪkwĪnkĪtā'äky yä'ät kajpxy matyā'äky pĪnĖ sää ja' ja tsyĖnää'yĪn ttanĪpäättĖ jĪts pĪnĖ tii ja' kĖ'm pyanājxtĖp pyatĖjkĪtĖp; tĪkäjtspts nĪke'exy ja wĪnmää'ny määjaty yĖ tunk pĖjkk tĖ tyuu'yĖ'Ėyy majtsk käjp;
- ku ja mĪtunpĖ mĪpĖjkpĖ ja myĪku'uk jĖ meeny ttanĪkaxte yyĪktĪkajtspy ja tsĖnää'yĪn, ka'p ja'yĪ jam jĖĖnjotp tĖjkjotp, nayĪte'n amuum ja pujx käjp ku ja kutunk'äjtĪ nyaxy wĪnjumĖjt, sääjaty kĖ'm ja tsĖnää'yĪn jĪts pĪnĖ tiijaty kĖ'm yyĪkpanājxp yyĪkpatĖjkĪp; jĪts jate'n wyĪnkĪtā'äky ku,
- Ka' yyuu'nkĪ, sää ja *Oportunidades* wĪnaty tjĖp'ijxy, ku Ėy tsuj ja tunk yyĪkpäätt pĪnĖ kajaa jäwĪ ja ĪxpĖjkĪn yyĪkmĖĖt'aty. Ja'ts jĪte'n yä'ät nĖky nyĪkajpxpy nyĪmatyakpy sää ja tsĖnää'yĪn tanää'yĪn tyĪkäjtsnĪ jĪts sää ja pujx käjp t'ijxy uk sää jyāwĪ yĖ'pĖ putĖjkĪn myĪtunyĪyĪ myĪ'Ėy'atyĪyĪ.

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# 1 Introduction

The aim of this research is to understand the linkages between social protection and migration through an empirical study of the Mexican cash-transfer programme, *Oportunidades*, in two indigenous locations. For the purpose of the study, social protection is defined as

all public and private initiatives that provide income or consumption transfers to the poor, protect the vulnerable against livelihood risks, and enhance the social status and rights of the marginalised; with the overall objective of reducing the economic and social vulnerability of poor, vulnerable and marginalised groups (Sabates-Wheeler and Waite, 2003: 10).

Conditional cash transfers (CCTs), such as *Oportunidades*, are thus one option within the range of social protection programmes that can be implemented by governments. CCTs are defined as ‘programs that transfer cash, generally to poor households, on the condition that those households make pre-specified investments in the human capital of their children’ (Fiszbein *et al.*, 2009).

This research focuses on the way in which *Oportunidades*, and migration, both international and domestic, influence each other. To understand this relationship, the study focuses on current and former programme beneficiaries, with a specific interest in those who were enrolled onto the programme, then known as *Progresa*, during its first years of implementation (1998–2000) and who were in their third to sixth year of primary school when their households were selected. These former beneficiaries will be referred to as ‘beneficiaries’ in the empirical chapters to facilitate their reading.

The evidence presented is from the state of Oaxaca, with a focus on the high region of the *Ayuujk Jä'äy* (pronounced ‘Ajook Jai’) indigenous group (also known as the *Mixes*, pronounced ‘mi-heh’). Oaxaca was chosen because of its wide coverage by *Oportunidades* and its international and domestic migration flows. *Oportunidades* in Oaxaca covers 8,192 localities and 452,686 households placing the state in the third and

fourth place respectively at the national level (Prospera, 2016a). Oaxacan migration began to increase in the 1970s, driven by the economic boom and population growth in Mexico, but it only started to grow rapidly in the late 1980s as a result of the economic crisis. The main destinations were the USA and internal destinations such as Oaxaca City and Mexico City (Cohen, 2010). Two locations within this state are compared: Tamazulapam del Espiritu Santo (henceforth referred to as ‘Tama’), and Santa Maria Tlahuitoltepec (‘Tlahui’). These sites were chosen due to their geographical and cultural proximity to each other, and their highly contrasting migration flows. The main focus of this thesis will be on the towns of Tlahui and Tama, but two more towns will be incorporated in the empirical chapters: Lindavista (part of the Municipality of Tamazulapam) and Tejas (part of the Municipality of Tlahuitoltepec). Lindavista and Tejas are included because of their different school characteristics – they do not have a high-school, therefore to continue studying requires additional costs. Their inclusion also allows me to assess the effect of different educational circumstances on *Oportunidades*’ participation and migration.

Tama and Tlahui are the head towns of their respective *municipios* (municipalities), the equivalent of a US county in terms of its administrative functions. Because their population ranges from 2,500 to 10,000 inhabitants – the official definition of an urban place in Mexico – Tama and Tlahui are designated as towns. Lindavista and Tejas are designated as rural ‘*rancherías*’ – political dependencies within their municipalities with populations under 2,500 inhabitants. I will speak of Tama and Tlahui as towns throughout the thesis to refer to their social and territorial space, while referring to Lindavista and Tejas as hamlets. The location of the four sites is shown in Figure 1.1.

**Figure 1.1 The *Mixe* region and the location of Tama, Tlahui, Lindavista and Tejas**



### 1.1 The background to *Oportunidades* and the persistent poverty in Mexico

Like other countries in Latin America during the decade of the 1980s, Mexico was hit by an economic crisis caused by a drop in oil prices, a fiscal deficit and an increase in the international interest rate. In this context, and with the beginning of a new wave of neoliberal policies, the Mexican state reduced its intervention in social policy. The government reacted to the global situation by stopping its import substitution strategies and modifying its development model to one that focused on exports. From 1982 and during the following decades, Mexico began to apply economic measures inspired by neoclassical economic theory (Yaschine, 2012). These measures were based on policies of export-led growth, trade and external financing and the reduced role of the state in economic activities (Vidal *et al.*, 2011).

Mexico joined the General Agreement on Tariffs and Trade in 1986 and, in 1988, began negotiations with the USA and Canada that led to the implementation of the North American Free Trade Agreement (NAFTA) on 1 January 1994, creating an open market between the three countries. Mexico became an exemplary case of the Washington Consensus<sup>1</sup> and, throughout the 1990s, the dominant agenda continued to privilege the market and the individual, while the intervention of the state continued to be reduced (Yaschine, 2012). However, the economy suffered a major macro-economic crisis in 1994–1995 that started after Mexico's devaluation of the *peso* in December 1994 and resulted in a fall in GDP of 6 per cent over the year 1995 (Levy, 2006). This has become known as the 'tequila crisis', an informal name initially given by the media. During the decade of the 1990s the Mexican population experienced its highest levels of inequality in income distribution during the second half of the century (Cortés, 2013). In addition, national levels of health, nutrition and education also worsened (Levy, 2006).

In some respects, the Mexican economy recovered during the second half of the 1990s. For example, between 1995 and 2000, Mexico grew on average by 3.0 per cent per year and, in 2000, it grew by 5.6 per cent (Cortés, 2013). However, the new economic model, oriented towards the international market and supported by NAFTA, had varying effects in the different regions of Mexico. For example, the outcomes were

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<sup>1</sup> The 'Washington Consensus' drove reforms through free trade and free markets as a crucial precondition for pursuing economic growth. The adoption of NAFTA was also implemented in this context.

negative for those regions not prepared to compete globally, and which found themselves falling further into poverty. In these marginalised regions of Mexico, households often had to make a choice between emigration or revolt (Durand *et al.*, 1999). States with high levels of poverty but with strong connections to the USA (e.g. Guerrero, Oaxaca and Michoacán) supported themselves through the flow of remittances. In addition, the uprising of the Zapatistas in the state of Chiapas, and the economic crisis that had begun in December of 1994, made clear the limitations of the ‘social liberalism’ stimulated by the government.

## **1.2 Social protection in the neoliberal era**

At the same time, the federal government began to apply programmes to increase the food consumption of poor households and, in the mid-1990s, a total of 15 subsidy programmes were introduced. These were highly imperfect: badly targeted and with limited impact on the poor (Levy, 2006). For example, more than half of the funding was allocated to bread and *tortillas* (a flat bread of maize) subsidies in non-poor urban areas and households, while 60 per cent of poor families received no support at all from the federal government (Levy, 2006). In this context, President Zedillo (1994–2000) aimed to change social policy, although building consensus inside the Cabinet was a slow process (Levy, 2006). Finally, the result of long negotiations came *Oportunidades*, launched as *Progresa* in 1997 and replacing previous consumption subsidies. In 2002, *Progresa* changed its name to *Programa de Desarrollo Humano Oportunidades* (*Oportunidades*); it was initially applied in rural areas, later being extended to semi-urban and urban areas.

Instead of ineffective subsidies or badly targeted cash transfers, *Oportunidades* aimed to give beneficiaries the freedom to choose how they used the transfer as long as they committed to respecting certain conditions, specifically in education, health and nutrition: behaviours that were considered to be investments in human capital (Fiszbein *et al.*, 2009). *Oportunidades* was designed with the idea that, instead of transferring income to the poor through different subsidies, it would be better to transfer income directly, in monetary terms, thus giving beneficiaries the freedom to choose how they allocate the transfer according to their needs. If the transfer aimed to help break the intergenerational transmission of poverty, its receipt must be conditional on investments that would help the poor to overcome their initial unsatisfactory conditions (Levy, 2006). Therefore, it was set up as a conditional cash-transfer programme targeted at



households in extreme poverty, with the aim of contributing to the reduction of inequality of opportunities and the intergenerational transmission of poverty (Yaschine, 2012).

The targeting of the beneficiaries is carried out in three stages: firstly, the programme uses geographic information to identify those regions and locations with high poverty rates. Within these regions, *Oportunidades* selects the locations with the highest poverty levels (based on their socio-economic characteristics) but with access to health and educational services. In a second stage, a socio-economic census is conducted in the selected locations to differentiate between potential beneficiary and non-beneficiary households, this time based on socio-economic and demographic variables. In the third and final stage, the programme makes public the list of the beneficiary households in each location (Rubalcava and Teruel, 2006). Once a new measurement is taken to decide whether they will continue receiving the transfer or not, beneficiary households are guaranteed to receive benefits for three years (Levy, 2006). An important clarification is that (as this study will illustrate) households that receive international remittances are not necessarily excluded from being beneficiaries. As long as they are still considered vulnerable due to their socio-economic and demographic characteristics they can continue receiving the transfer. Indeed, previous evaluations have found that households that receive *Oportunidades* are more likely to receive remittances, reflecting the fact that families that are in greater need of an extra income also send other members of the household to the USA (Meza and Pederzini, 2009). Different studies have found that *Oportunidades* does not crowd-out remittances, and that, indeed, their complementarity is beneficial for the impact of the programme (de la Rocha, 2009; Sanchiz, 2006; Teruel and Davis, 2000). However, Teruel and Davis (2000) suggested that beneficiary households receiving both incomes might be reporting lower amounts and frequency of remittances in order to gain entry to *Oportunidades*.

To achieve its objectives, *Oportunidades* has three main and interlinked components. The first is the *nutrition component*, which is a mix of cash and in-kind benefits. All households on the programme receive the same monthly cash transfer regardless of the number of household members. Pregnant or breastfeeding women, children between four months and two years old, and undernourished children between three and five years old receive an in-kind nutritional supplement. Households can receive their cash transfers and nutritional supplements (delivered to the mother) only if they attend a

health clinic regularly. The second component, *health*, is then provided when members of the household visit the health clinic to qualify for the cash transfer; this component is closely linked with the nutritional component. At the health clinics, mothers are given talks on health and nutrition topics, and teenagers also attend talks related to reproductive health and drug addiction. Individual choice comes into the equation, since families can freely allocate the cash to be used at any store to buy food or any other items; they can also purchase productive items (such as agricultural assets or cattle) or save the money for the future (Levy, 2006).

The third is the *educational component*, designed to increase the school enrolment of young people by transferring educational grants to the mothers, who then are required to ensure that their children attend school regularly. Children enrolled in Grades 3 to 12 are eligible to receive this grant every two months. If the attendance requirements are not met (a monthly attendance rate of 85 per cent), the amount linked to that particular child is deducted from the bi-monthly payment. Subsidies are also given for school supplies (Levy, 2006)

The size of this grant is determined by considering what a child would earn in the labour market or contribute to family production if he or she left school. The scholarship is also fixed nationally, and is therefore independent of the wealth or cost of living in the state or town, the poverty level of the household prior to entry onto the programme, and the *per capita* availability of public funds in any given state or municipality. Grants increase as children progress to higher grades; from secondary school they are slightly higher for girls, since this is the age at which their drop-out rates begin to be higher compared to boys (see Table 1.1). Households with more eligible children enrolled at '*primaria*' (primary) and '*secundaria*' (junior high or secondary)<sup>2</sup> receive higher transfers of money, with a monthly limit of MXN\$1,825<sup>3</sup> by 2017 comprising the nutritional component (MXN\$475) and the educational component (MXN\$1,350). For households with children enrolled at '*preparatoria*', the maximum amount they can receive is MXN\$2,945.00, which is composed of the nutritional component (MXN\$475) and the educational component (MXN\$2,470). All students

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<sup>2</sup> In Mexico, the basic education includes six years of primary school (attended from 6–12 years old); three years of '*secundaria*' – the equivalent to junior high or secondary school – is attended when the child is 12–15 years old; '*preparatoria*' – the equivalent to senior high or sixth form – is attended from the ages of 15–18 years approximately.

<sup>3</sup> GBP/MXN= 25.35; USD/MXN= 20.31, as of 13 February 2017.

who finished senior high used to receive, before 2016, an additional one-off cash transfer with a value of MXN\$4,890. However, this amount was no longer listed in the latest 2017 regulations of the programme, which now includes a direct transfer to beneficiaries who continue studying higher education, with a value of MXN\$750 monthly in addition to a commuting support of MXN\$200.

Two comments are important to highlight concerning the transfer. First, the grants provided under *Oportunidades* seem to be quite generous for the budget of a family. It has been estimated that all the cash components represent approximately 22–25 per cent of the total income of a beneficiary household (Levy, 2006; Rubalcava and Teruel, 2006) and that more than 85 per cent of the benefits of the programme are in cash (Levy, 2006). Second, it is important to note that the different components of the programme and their value differ depending on the household. Figure 1.2 shows the historical distribution of a monthly payment in Mexican *pesos* for a beneficiary household, according to the official data reported by the programme (Prospera, 2016b).

**Table 1.1 Monthly educational grants corresponding to the first semester of 2017 in Mexican pesos<sup>4</sup>**

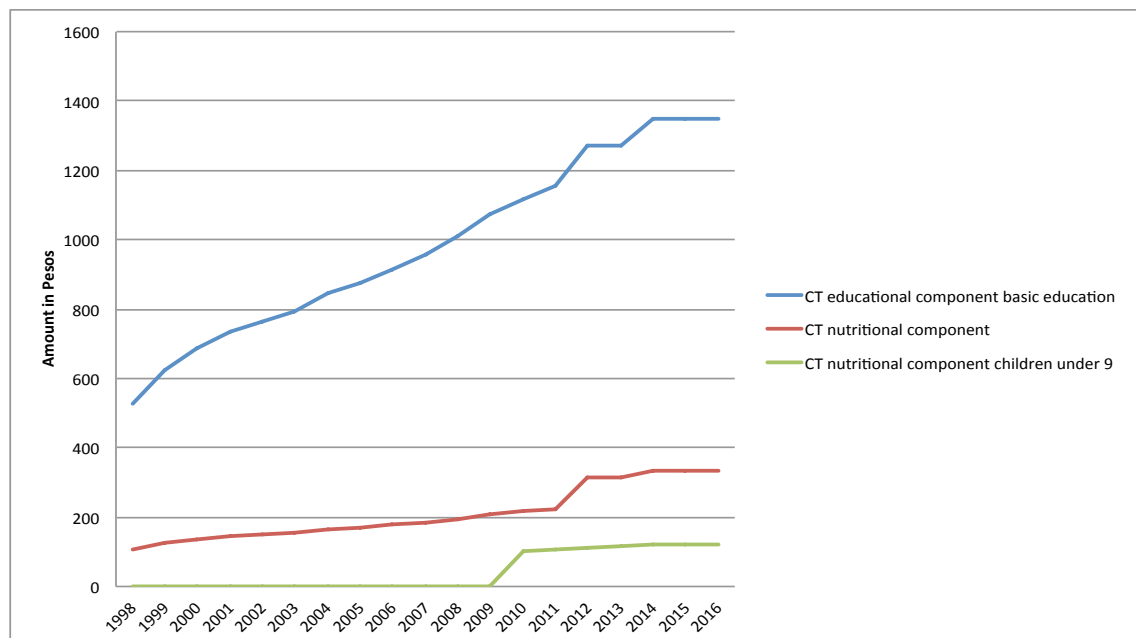
<b>Primary school</b>	<b>Boys and girls (\$)</b>	
First	175	
Second	175	
Third	175	
Fourth	205	
Fifth	265	
Sixth	350	
<b>Junior-high</b>	<b>Boys</b>	<b>Girls</b>
First	515	540
Second	540	600
Third	570	660
<b>Senior-high</b>	<b>Boys</b>	<b>Girls</b>
First	865	990
Second	925	1,055
Third	980	1,120

Source: Prospera (2016b).

<sup>4</sup> GBP/MXN= 25.35; USD/MXN= 20.31 as of 13 February 2017.

In Figure 1.2, the smallest transfer is the nutritional component received only by households with children under the age of nine. The next-lowest transfer is the nutritional component, which corresponds to the value of the food subsidy for a beneficiary household regardless of its size. The total cash transfer increases with the number of children in school, depending on their school grade; the educational transfer is added to the nutritional transfer. This means overall that, even though the average cash transfer for all families was MX\$475 a month in 2016, the transfer considerably increased for households with children in school. The educational component, the highest transfer shown in the figure, refers to the maximum educational transfer that a family with children enrolled in either primary or secondary school can receive in a month, which, by 2016, was MX\$1,350. Therefore, the educational grant is the largest source of grant income for a beneficiary household. This fact was an important influence on the research design of the project, as I decided to focus on the outcomes (both in terms of migration and in general) of the cash transfer for those direct beneficiaries who were targeted to receive the educational grant in order to increase their human capital.

**Figure 1.2 Historical cash-grant amounts per household per month 1998–2016**



Source: Own elaboration of data from Prospera (2016b).

However, this final intended outcome (its effect on the access of these beneficiaries to the labour market and its contribution to breaking the legacy of inequality and poverty) has been called into question (Yaschine, 2012). For example, the last census of the Mexican population in 2010 showed that 67 per cent of youth between 15 and 17 years of age were enrolled in school (INEGI, 2010), a considerable increase on the 2000 level of 55 per cent. However, the same 2010 census also showed that only 45 per cent of youth aged 15 to 17 years belonging to households living in only one room were studying.<sup>5</sup> These types of household are the main target population of *Oportunidades*; the data suggest that barriers still exist for its young people wishing to enrol in education compared with those of the national population. This trend is confirmed by the results from Yaschine's (2012) research, which focused on youth between 18 and 24 years who benefited from *Oportunidades* for up to 10 years, and who belonged to households in extreme poverty, according to the selection criteria of the Mexican government in the areas where the programme was first launched. Yaschine's study found that these youths had a 34.2 per cent probability of completing secondary school, and only a 25.9 per cent probability of enrolling in higher education. The same young people also had a 41.1 per cent probability of working in agricultural activities, especially for males staying in their places of origin, suggesting that higher levels of education did not guarantee access to the wider job market or to higher incomes.

Overall, in the last two decades, Mexico has made noteworthy progress in the coverage and effectiveness of its social protection system (World Bank, 2014a). However, no improvements in the quality of basic services (family income and access to food or social security) have been made in the last few years, which has hindered the social development of the country (CONEVAL, 2014). According to the National Council for the Evaluation of Social Development Policy (CONEVAL, 2012, 2014), the number of people living in poverty (as defined by the proportion of the population living below the poverty line and deprived of at least one of the six social rights<sup>6</sup>) increased by half a million between 2010 and 2012, from 52.8 to 53.3 million, an increase of 45.5–46.1 per cent of the total population, and was mainly due to a decrease in real income. By 2014

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<sup>5</sup> These are young people living in private dwellings that only have a single room. The indicator comprises dwellings classified either as an independent house, an apartment in a building, a dwelling or a room in a tenement block, a dwelling or a room on a roof top and those that did not specify the class of dwelling (ITER, 2010).

<sup>6</sup> The six social rights include: the educational gap, access to health services, access to social security, the quality and space of the dwelling, access to basic services in the dwelling and access to food.

this number had increased to 55.3 million or 46.2 per cent. This was partly the result of the global financial crisis of 2008. Nevertheless, although the absolute number of poor people has increased, the incidence has not. This is important to note because, although Mexico has not improved its poverty indicators, these have not become decidedly worse. However, as noted by the World Bank (2009), about half of the 8.3 million people thrown into poverty in Latin America as a result of the global crisis were in Mexico. This crisis provides part of the wider context of the lives and decisions of participants in this study, as their accounts will illustrate. I now briefly describe the main effects of the global crisis on Mexico.

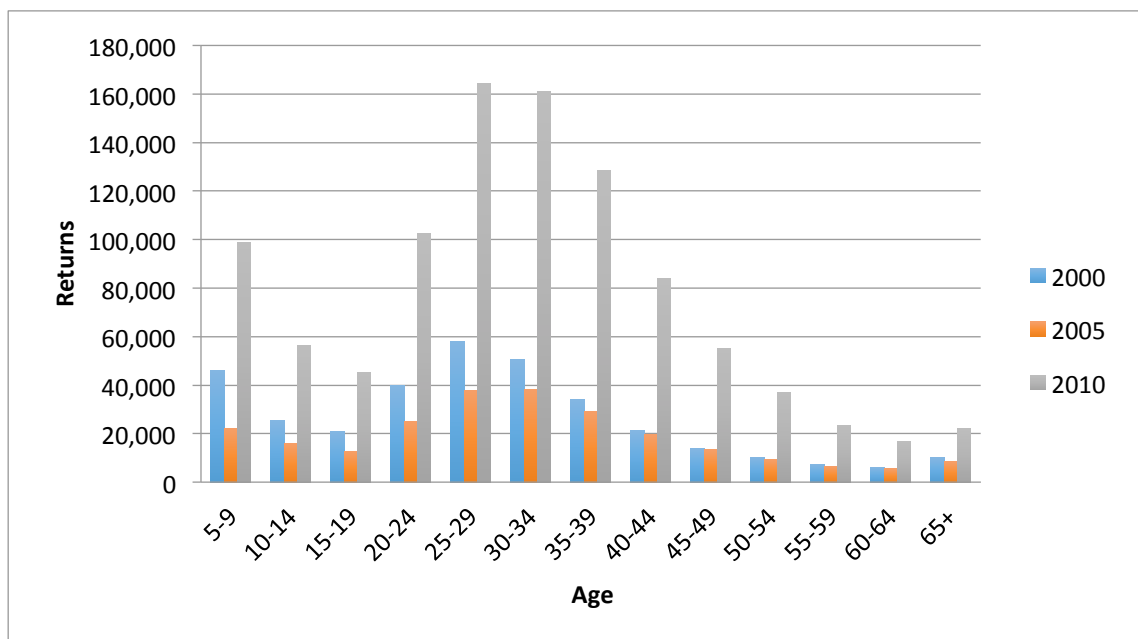
### **1.3 The effects of the global financial crisis in Mexico**

Firstly, during 2009, following the crash, Mexico's GDP contracted by 6.7 per cent, while other economies in the region (like those of Argentina and Brazil) grew by 0.7 and 0.3 per cent respectively (Vidal *et al.*, 2011). This shows the dependence of Mexican employment and trade on the USA economy – often linked to migration. For example, the International Monetary Fund reported production and trade flows in the Mexican car industry to the USA dropped by 40 per cent, along with a corresponding decline in manufacturing more broadly (IMF, 2010). Likewise, data from the World Bank (2016a) show that remittances to Mexico decreased from a peak reached in 2007 of US\$ 28.88 billion to US\$ 22.07 billion in 2009. Remittance levels began to recover in 2014 and, by 2015, they had reached US\$ 25.94 – however, still far below the amounts for 2007. One possible factor explaining this trend could be the effect of the crisis on both the service sector and, especially, the construction industry in the USA – a major job source for Mexicans. In addition to this, the recession was followed by a decrease in the Mexican immigrant population in the USA, due to fewer arrivals, increasing departures and an increase in deportations. Data from the population censuses taken by the National Institute of Statistics and Geography (INEGI, 2000, 2005 and 2010), which looked at the returns of those who had migrated in the preceding five years, confirm this change in the pattern of migrant returns. While from 2000–2005 the number of returns from the USA reduced from 343,790 to 244,244, in 2010 the returns sharply increased to 994,474. The age groups with the largest increase in returns from 2005 to 2010 included those between 20 and 49 years old, as well as children aged five to nine years old, reflecting the return of their parents (see Figure 1.3).

One flaw of the data is that they only measured the return of those who migrated to the USA in the five years prior to each survey. Therefore, the numbers would probably be greater if we considered the population who migrated and stayed in the USA for more than five years and who could have returned to the home country, for example, in their retirement years. This increase in the return of Mexicans from the USA is confirmed by estimates from the National Population Council (CONAPO, 2015) based on data from INEGI and from the US Census Bureau.

These data showed that the biggest increase in those who were the most likely to return between 2000 and 2010 was mainly of men between the ages of 20 and 54 years old; for the group of 50–54-year-olds, the probability of return increased from 2.9 to 5.9 per cent, while for the group aged 25–29 years old it almost tripled from 6.5 to 16.5 per cent.

**Figure 1.3 Mexican population aged 5+, 2000-2005-2010 living in the USA five years earlier**



*Source:* own elaboration of data from INEGI (2000, 2005, 2010)

However, those migrants who did return might not necessarily have found themselves in a better situation – they faced higher unemployment rates. According to the World Bank (2009), unemployment in Mexico reached 5.3 per cent for the month of February 2009 – the highest level since 1996, when the Mexican economy was recovering from

the so-called ‘Tequila crisis’ of 1994. Unemployment reached 6.1 per cent at the end of 2009 and, since then, has remained above 5 per cent (CONEVAL, 2014). Furthermore, by 2014, from a total working population of 49.7 million people, 28.8 million (58 per cent) were employed in the informal economy (CONEVAL, 2014). For youth between 15 and 24 years old, unemployment was even higher, increasing from 6.2 per cent in 2006 to 9.9 in 2014 (World Bank, 2016b).

In addition, the evaluations of CONEVAL (2010a, 2012, 2014) have found that the income of Mexican households has not increased since 1992. For example, between 2008 and 2010, the total population earning an income below the poverty line (whose value, estimated by CONEVAL, is equivalent to the cost of the food and non-food basket together) increased from 53.7 million (49 per cent) to 58.5 million people (52.0 per cent). This number continued increasing, with 60.6 million people (51.6 per cent) by 2012 and 63.8 million (53.2 per cent) by 2014. However, although the absolute number has continued to increase, the proportion of the population with an income below the poverty line seems to be relatively stable. CONEVAL (2014) highlights that the lack of growth in household income since 1992 can be explained by the economic crises of 1995 and 2009, and by a lack of investment and productivity, the volatility of food prices since 2007 and a very low minimal wage level which, by 2016, was MX\$73.04 (US\$4).

One of the main instruments of the Mexican government enabling it not only to increase income and reduce poverty, but also to mitigate the financial crisis, was *Oportunidades*, the coverage of which increased in 2008 from 5 to 5.9 million families, living mainly in semi-urban and urban areas that were previously under-covered by the programme (World Bank, 2014a). Nevertheless, the intended outcome (to reduce poverty) was not achieved as expected. This was because *Oportunidades* was designed to tackle structural problems (such as the cycle of inter-generational poverty) instead of shorter-term situations of shock or uncertainty, as in an increase of food prices. While its main beneficiaries lived in rural areas, the most affected population of the crisis lived in urban and border areas with the USA (CONEVAL, 2014), areas which are more connected to international markets and more vulnerable to an increase in food prices (CONEVAL, 2014).

However, this does not mean that, in agricultural localities such as Tama and Tlahui, poverty levels are lower. While the people the most affected by the crisis were to be



found in cities, the worst poverty is still to be found in the marginal rural parts of Mexico. Poverty and inequality in Mexico remain linked with gender, ethnicity, age and locality. For example, as CONEVAL (2015) shows, in 2012, 40.8 per cent (11.1 million) of the rural population did not have even basic services in their households, compared with 7.2 per cent (6.5 million) of city dwellers. In 2014, both poverty and extreme poverty were higher in rural areas (61.1 per cent and 20.6 of the population) than in urban areas (41.7 per cent and 6.2 per cent of the population). Furthermore, Oaxaca, where Tama and Tlahui are located, was the state with the largest proportion of the population – just behind Chiapas – living in poverty (66.8 per cent) and extreme poverty (28.3 per cent). Finally, it is important to note that, although locations like Tama and Tlahui are classified as non-rural due to the size of their population (more than 2,500), they are effectively rural towns since the main source of livelihood is still agriculture and cattle, they have fewer opportunities for income diversification, and they are also indigenous – the proportion of whom living in poverty in Mexico is 72.3 per cent compared with 43.2 per cent of the non-indigenous (CONEVAL, 2015).

#### **1.4 Aspects of poverty in Mexico**

In its recent evaluations, CONEVAL (2010a, 2012, 2014, 2015) revealed that the levels of poverty have not decreased. For example, the proportion of the population suffering from moderate to severe food insecurity sharply increased from 23.8 million people in 2008 (21.7 per cent) to 28.4 million in 2010 (24.8 per cent). This number slightly reduced to 27.4 million in 2012 (23.3 per cent) but, in 2014 increased again to 28 million (23.4 per cent).

Even if a great number of social protection programmes in the country exist, offered by both federal and state governments, so, too, do a lack of coordination and planning, and great difficulties in terms of accessing these programmes. In the case of *Oportunidades* in 2010, about 500,000 households were identified as poor but had not been included for various reasons, among which, for example, the villages did not have access to a health unit, and were small and dispersed, or due to administrative difficulties (CONEVAL, 2012). In recognition of this, the government started a ‘New Generation Social Policy’ which aimed to reduce poverty and inequality by increasing opportunities for all, including through greater access to employment and productivity-generating opportunities, and promoting citizens’ participation at the local level (World Bank, 2014a).

In 2014, the Mexican government named the programme PROSPERA, aiming to connect its beneficiary households to employment or productive opportunities that could enhance their social mobility and their ability to generate income (World Bank, 2014a). In addition to the cash transfer, the focus of the programme was to facilitate and encourage families to engage with the additional programmes and services on offer. The announced changes of the programme focused attention on:

1. different strategies for graduating youth;
2. facilitating access to scholarships for higher education and/or labour orientation and training courses, particularly for families with many years on the *Oportunidades* programme; and
3. facilitating access to other social programmes, housing, and employment (World Bank, 2014b).

As part of this new coordination effort, 29 social and productive federal programmes have modified their operating rules and formally agreed to provide preferential access to *Oportunidades*' beneficiaries. In addition, the programme incorporated the Indigenous People's Plan (IPP) (2014–2018). In 2009, about 26 per cent of the 5 million beneficiary families were indigenous and the proportion remained constant after the programme's expansion (26 per cent of 5.8 million beneficiaries in 2013). The aim of the IPP was to:

1. increase coverage in indigenous areas/localities; and
2. improve the capacity to reach out, communicate and provide services to indigenous beneficiaries.

*Oportunidades* thus remains the principal anti-poverty programme of the Mexican government and the main pillar of its social policy. On the Mexican public policy scene, it is the most carefully studied programme ever, with quasi-experimental evaluations launched at the same time as the programme was initiated. Currently, the programme benefits slightly more than 6 million poor families (PROSPERA, 2016a). About 70 per cent of beneficiary households are in rural areas and 16 per cent live in semi-urban areas, with the remaining 14 per cent in urban areas (World Bank, 2014b). However, its anti poverty effects need to be considered in conjunction with the actual strategies of poor people, one of which is migration.

### **1.5 The importance of understanding the relationship between *Oportunidades* and migration, and contested results**

Recent studies have suggested that having access to other sources of livelihood, including the benefits from a public social protection programme, can affect the decision to migrate (Posel *et al.*, 2006; Stecklov *et al.*, 2005; Winters *et al.*, 2006). Likewise, in Mexico, the linkages between *Oportunidades* and migration have been observed but with very different outcomes (see, for example, Angelucci, 2004; Stecklov *et al.*, 2005). These linkages are not fully understood and will be elaborated upon in the following chapter. Understanding the linkages between cash transfers and migration is useful because most of the countries in which the migrants are employed have a long tradition of international migration (Angelucci, 2012). Mexico is a prime example of both internal and international migration.

As I have shown in the previous section, *Oportunidades* is Mexico's most important social protection programme. Although its intended outcome (to reduce the intergenerational transmission of poverty) is in question, it has been shown to reduce other aspects of poverty. For example, important positive impacts have been reported on health (Barber and Gertler, 2008; Fernald *et al.*, 2008), education (Manley *et al.*, 2015; Skoufias *et al.*, 2001) and nutrition (Behrman and Hoddinott, 2005; Hoddinott and Skoufias, 2004). It was the first social programme in Mexico to undertake a rigorous independent evaluation of its impact, including randomly assigned treatment and control groups. As a result it has been considered as an iconic programme worldwide due to the well-known evaluations of its impact, the public availability of its data, and the subsequent and highly relevant literature that it has produced (Fiszbein *et al.*, 2009). These distinct features, together with its reliable external evaluations, have made it currently the most significant poverty alleviation programme in the developing world (Handa *et al.*, 2009).

On the other hand, Mexico has long been a major sending country of migrants, particularly to the United States. In terms of international migration, there were 13.2 million Mexican migrants in 2013, and the Mexico–United States corridor is the largest migration corridor in the world (World Bank, 2016a). In terms of internal migration, 3.3 million people migrated from one Mexican state to another between 2005 and 2010, and there was a total stock of 19.7 million internal migrants in 2010 (CONAPO, 2014). All

these features indicate that Mexico is, in fact, a very attractive country in which to research the linkages between cash transfers and migration.

The state of Oaxaca also provides an exceptional location for studies on migration and cash transfers, due to its two differentiated traditions of international and domestic emigration from rural areas. The field sites of this study were chosen to illustrate this. In the neighbouring municipalities of Tama and Tlahui, the rural population from the four selected research sites have migrated to very different locations and under very different circumstances. This scenario is ideal for looking at both the different and the similar patterns of the mutual effects of *Oportunidades* and migration, and the outcomes for its beneficiaries over the long term. The results obtained from a Mexican case study on *Oportunidades* and migration can also be easily extended to other sets of countries which have taken *Oportunidades* as a model or which share similar characteristics: a conditional cash-transfer programme targeted at the most vulnerable households which, at the same time, have been the main actors involved in internal and international migration.

Because the evidence of the linkages between *Oportunidades* and migration has grown significantly over the last few years, my study can be regarded as contributing to efforts to understand the complex relationship between them. Moreover, the theoretical approach, design and methodology make my thesis innovative. Firstly, I draw on existing theories of the migration decision-making process and consider what the outcomes would be if a CCT were included in the decision to migrate. Into this I incorporate new approaches looking at aspirations and capabilities (Carling, 2014; de Haas 2010). The decision to migrate is analysed not only through previous theories but also by considering the individuals' aspirations for their future upon completion of a cash-transfer programme, and my thesis also examines how these aspirations and decisions might vary depending on the destination. This theoretical framework will be discussed in the following chapter.

Secondly, this study offers a methodological approach that is different to previous studies that have focused on this topic. An urgent need exists to contextualise the diverse results of the quantitative evaluations, adding to the few qualitative studies that have focused attention on the relationship between *Oportunidades* and migration (see Bañuelos, 2006; de la Rocha, 2009; Martinez, 2000). This study aims to fill the gap in understanding the aspirations of beneficiaries upon completing the programme, the

circumstances under which they decided to migrate and their life trajectories not only in their locations of origin but also in the different destinations to which they migrated. The only way to analyse this issue is by disentangling the decision to migrate itself for individuals, and by making an effort to find former beneficiaries who not only stayed in their areas of origin, but who also migrated within Mexico and to the United States, to unpack their decision-making process. All these factors can make the findings of my research valuable. This study will thus contribute to filling the gaps in what is known about the effects that *Oportunidades* can have on the decision to migrate and, *vice versa*, how migration can affect the outcomes of *Oportunidades*. It also offers important qualitative and ethnographic data on the mutual effects between cash transfers and migration through multi-sited research which began in the high region of the *Mixes* in Oaxaca, continued in Oaxaca City and Mexico City, and ended up in California, USA.

### 1.6 Research questions

In order to explore the topic, I will pose two overarching research questions:

1. In what ways does *Oportunidades* influence the decision to migrate?
2. What are the long-term outcomes for those beneficiaries who have benefitted from the programme and migrated?

These overarching questions will test three competing but not mutually exclusive hypotheses:

- a) *Oportunidades* can reduce the pressure to migrate, as beneficiaries in households targeted by the programme increase their income and well-being.
- b) *Oportunidades*, by increasing educational levels and human capital and then raising aspirations, will make it more likely that those who have benefited from the programme will migrate.
- c) *Oportunidades* can have varying impacts when beneficiaries are exposed to the different migration contexts at the local and the household level.

The following sub-questions will help to uncover the different issues raised by the overarching questions:

1. In what ways do cash transfers influence youth aspirations and migration, and what other factors play a role in their decision to migrate?

2. How does *Oportunidades* impact on the life trajectories and the long-term outcomes of the beneficiaries and what other factors can also influence them?
3. How are cash transfers and internal/international remittances used and how do they complement each other?

My research will not answer the question as to whether cash transfers have a direct and linear impact on increasing or decreasing migration. However, my study *will* attempt to provide important insights into the migration decision-making process (at the individual and household levels) of those who benefited from this educational grant, and the possible role of *Oportunidades* in the decision-making process. In so doing, this study will contribute to the debate on the determinants to migrate which go beyond economic factors by demonstrating the importance of the aspirations that individuals shape for themselves, the role of the context and social norms of the locations of origin, and the role that cash transfers play or not in their decisions and their long-term lives.

### **1.7 Structure of the thesis**

The next chapter (Chapter 2) presents the existing literature on the impacts of social protection programmes on migration in different countries, and the relationship between *Oportunidades* and migration. This will be followed by a discussion of the four theoretical approaches which I will use to analyse my empirical findings – 1) classical theories of decision-making around migration; 2) new economics of labour migration that focus on households; 3) network theory, and 4) the structure/agency approaches incorporating the ideas of de Haas (2010, 2011) on aspirations.

The third chapter (Chapter 3) describes the different methods I employed, the size of the sample, the difficulties I faced in the field and how I resolved them. After this, I present the core of the analysis and the outcomes of fieldwork in different locations.

Chapter 4 presents the context. This chapter mainly relies on official data, on primary data that complement the official data, including the insights of a short questionnaire applied to current beneficiaries and non-beneficiaries, and on semi-structured interviews with key actors and young migrants. It briefly presents the recent migration histories of Mexico and Oaxaca in order to site the locations in a broader context. I then focus on the towns, examining first the quantitative key indicators (including demographic, migration and socio-economic indicators) then qualitative data assessing the

particularities and differences between Tama and Tlahui, especially regarding the role of remittances.

Chapters 5 and 6 present the results of my interviews with former beneficiaries, both in Mexico and in the USA, and those of the focus groups with current beneficiaries. Chapter 5 will focus on Tama, while Chapter 6 will cover Tlahui. Each chapter presents case studies that are used to examine the shaping of aspirations and the decision to migrate of former beneficiaries, including the influence (or not) of *Oportunidades*, and the importance of other circumstances at the household and the local levels. The trajectories of both former beneficiaries and non-beneficiaries after the programme will also be assessed in order to highlight their differences and similarities. However, my focus is on those who migrated and on whether their aspirations changed upon arrival at their destinations. Moving on from former beneficiaries, the last part of each of these chapters looks at what current beneficiaries think they might do, and what the main challenges are that they envisage, in order to test the role of aspirations as drivers of migration. Current beneficiaries from Lindavista (in the Tama chapter) and Tejas (in the Tlahui chapter) are included in the last part of each chapter in order to compare the outcomes in locations with different school characteristics and higher degrees of poverty. These current beneficiaries are those who are either in the transition between junior-high and senior-high school, or senior-high school and university – a critical stage in school attainment in the locations of study since drop-out rates began to increase.

Chapter 7 summarises the main conclusions, and offers some policy recommendations on *Oportunidades* and its influence on migration.

# 2 Literature Review

In this chapter I present a review of the literature on the linkages between social protection and migration, with a particular focus on *Oportunidades*. In the first part I set out the evidence concerning four different types of social protection programme (unconditional and conditional cash transfers, public works and social insurance programmes) to show the identified factors that explain the opposite outcomes of the studies and the lessons that the evidence provides. In the second part of this review, I engage with an analysis of the studies that have determined the impacts that *Oportunidades* has on migration and *vice versa*. I argue that more is known about the effects of *Oportunidades* on migration than the effects of the migration context on *Oportunidades*. This thesis attempts to correct this view. I argue that this literature tends to focus on quantitative studies and lacks a qualitative focus on decision-making processes. Following this, I examine the evidence that exists about beneficiaries' trajectories after *Oportunidades*. Finally, I present a theoretical framework which aims to make sense of and interpret my empirical data – based on existing theories that focus on the decision to migrate – with the aim of understanding how *Oportunidades* might fit in the decision-making process, and the other factors that might play a role.

## 2.1 The effects of social protection on the decision to migrate

In this section I present an overview of the social protection programmes in low- and middle-income countries that were found to influence the decision to migrate; these include: a) unconditional cash transfers; b) conditional cash transfers; c) public works; and d) social insurance programmes.<sup>7</sup> The evidence will be presented in that order, before I introduce the factors I identified as having influenced the different outcomes and the lessons that the literature provides when analysing this topic.

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<sup>7</sup> I am extremely grateful to Jessica Hagen-Zanker, with whom I conducted this extensive literature review in the months of December 2011 and March 2012, when I was an intern at the Overseas Development Institute (ODI) as a member of the social protection team. I have updated the references to 2016.



### 2.1.1 Unconditional cash transfers

The evidence on the South African Old Age Pension (SAOAP) scheme (Ardington *et al.*, 2009, 2016; Inder and Maitra, 2004; Posel *et al.*, 2006; Sienaert, 2008), a non-contributory pension, is the only social protection intervention that has clearly shown a positive relationship with internal migration – and mainly female migration. As the SAOAP is a generous pension – a maximum of 1,080 Rands per month in 2010, equivalent to USD\$ 100 or nearly twice the median *per capita* income for the black population (Ralston *et al.*, 2015) – it has been suggested that the SAOAP has helped other members of the household to pay for the journey and for the initial period of settling down in their urban destinations. Indeed, the evidence on the SAOAP also illustrated that gender is important: migration was more likely to increase when the pensioner was a woman (Ardington *et al.*, 2016), suggesting that female beneficiaries tended to share their income more with other members of the household. This example demonstrates how social protection schemes can have an impact even on non-direct recipients and change the dynamics within households.

However, from the evidence, it is not clear which individuals in the household decide to migrate. Ardington *et al.* (2016) found that the pension increased the migration of young male adults who had completed high school and were looking for better job opportunities. In contrast, Inder and Maitra (2004) found that a female pensioner decreased the migration of male members of the household, while Posel *et al.* (2006) found no effect on male labour migration whatsoever. In the case of female migration, all studies found that women were more likely to migrate for labour purposes because the pension allowed them to afford the costs of migration on condition that other members of the household, probably the grandmothers, offered childcare. While the literature on the SAOAP has explained how it facilitated migration, it has not addressed the particular reasons for the increase in female migration. Only Posel *et al.* (2006) suggested that it could be due to higher costs of children's schooling and childcare, while Ardington *et al.* (2009) found that, after reaching their 30s, women in beneficiary households migrated less, though the causes were unclear.

Other kinds of impact have been observed in the case of unconditional cash-transfer programmes, which are less linear than in the South African case. In Kenya, Soares (2011) suggested that the Transfer for Orphans and Vulnerable Children (CT-OVC)

increased the migration of youths as a result of a decrease in credit constraints. In the case of another unconditional cash-transfer programme implemented in Kenya, the Hunger and Safety Net Programme (HSNP), the transfer had no significant impact on the decision to migrate, either because the benefits were too low to finance migration or because young people were migrating without their parents' permission (Deshingkar *et al.*, 2015).

### 2.1.2 Conditional cash transfers

*Oportunidades* is the CCT that has been the most studied and has offered the most insights about the effects of cash transfers on migration; these will be individually analysed later in this chapter. The other conditional cash transfers examined by Silveira-Neto and Azzoni (2008) in Brazil, Winters *et al.* (2006) in Nicaragua and Honduras, Soares (2011) in Malawi or Deshingkar *et al.*, (2015) in Malawi and Tanzania have shown very different impacts.

For example, in Brazil, Silveira-Neto and Azzoni (2008) found that *Bolsa Familia* had a negative impact on migration and no impact on return migration. The authors did not offer an empirical reason for these differences but suggested that beneficiaries were sensitive to the amount of the cash transfer and the potential costs of migration, while migrants perceived that the cost of returning, though not necessarily monetary, could be higher than the cost of the initial migration. In Malawi, other individuals joined beneficiary households in order to gain from the subsidy, thus reducing migration, as shown by the *Mchinji SCT* in Malawi (Soares, 2011). Another example is from Mexico, where the implementation of *Procampo*, targeted at farmers, decreased temporal and permanent migration (Gonzalez-Konig and Wodon, 2005) either due to the physical conditions of the programme (farmers were required to cultivate one of the nine eligible crops and the gains from migration were not perceived to compensate for the loss in production) or because the transfer helped farmers to reach a certain income and thus to avoid the need for migration.

Therefore, the evidence shows that, even if CCTs were similar in their design, implementation and objectives, their impact on migration was quite different due to a number of factors, an important one of which was context. Winters *et al.* (2006) clearly showed that migration outcomes differed due to the context under which the CCT was evaluated. In the case of Nicaragua, access to the Social Protection Network (RPS) increased migration but this result was observed under the context of a coffee crisis in

2000 that hit the country during the years of implementation of the programme. The authors (Winters *et al.* 2006) suggested that the transfer allowed beneficiary households to finance the initial costs of migration over that period. What the study could not explain was whether this increase in migration was temporal or permanent due to the short time period of the evaluation.

Another explanation for the different results was not just the size of the transfer but whether or not the income was significant for the household. In the cases where the transfer was apparently high enough, migration decreased; for example, for *Bolsa Familia* in Brazil (Silveira-Neto and Azzoni, 2008) and *Procampo* in Mexico (Gonzalez-Konig and Wodon, 2005). Similarly, in the case of Honduras, Winters *et al.* (2006) suggested that young adults between the ages of 15 and 29 could afford to leave their households and form new ones within the locality as a result of the Family Assistance Programme (PRAF). More research is needed to determine whether this result came from a changed perception of improved living conditions or because the role of the conditions of the CCT required individuals to stay put. However, other programmes, in spite of their conditions, did not deter the migration of some of the beneficiaries. One example was TASAF-II, in Tanzania, which showed that, even if school attendance was a condition up to the age of 18, beneficiaries still migrated after Class 7, or from 12 years old (Deshingkar *et al.* 2015). These authors were unclear about how this was occurring but it is possible that the benefits of migration were perceived as greater than staying on at school. Therefore, migration could also have an impact on the intended outcomes of cash transfers, an issue which needs further research.

Moreover, most of the evidence on CCTs has been dedicated to the impacts that an additional income could have on migration flows, ignoring other long-term outcomes. Some evidence exists to suggest that a CCT could modify the types of migration and the profile of migrants. For example, more-educated youths could migrate in order to enter higher education or to find better-remunerated jobs when the economic conditions in the area of origin did not improve (Deshingkar *et al.* 2015 in Malawi and Tanzania). Thus, school attendance could, in theory, reduce youth migration but, in the long term, it could also promote it when beneficiaries aim either to continue studying or to apply their new skills in jobs abroad. More research on the long-term outcomes of CCT is needed in this respect.

### 2.1.3 Public works

Public works programmes (PWPs) provide paid (monetary or in-kind) employment on public works projects such as the building of roads and schools, the cleaning of irrigation channels, water conservation works, or the building of river embankments. They also include employment schemes that guarantee a fixed time-period of paid employment.

The National Rural Employment Guarantee Act (MNREGA) in India, a programme that provides up to 100 days of paid work to rural households each year, has been the most examined in terms of its linkage to migration. The evidence suggests that MNREGA has not been as effective as expected in reducing overall distress migration (migration in response to a shock or stress). This was explained by several reasons. First, the additional income gained through migration was higher than the salary provided through the MNREGA schemes (Jacob, 2008). Second, the provision of the number of days of work did not match the number promised by the programme (Deshingkar *et al.*, 2010; IAMR, 2007). Third, the combination of implementation problems created meant that people could not rely on MNREGA and continued to favour migration as a source of income (Deshingkar *et al.*, 2010). However, MNREGA also provided an important safety net, especially for households belonging to poor, landless and socially disadvantaged communities (Parida, 2016) and for poor and vulnerable women (Deshingkar *et al.*, 2010; Jacob, 2008). Short-term migration in India decreased in states that were able to offer a greater number of employment days (Centre for Science and Environment, 2008; Papp, 2012). Even if some women earned less with MNREGA, it offered them a steady and reliable flow of income as opposed to the uncertainties of migration and brought them the possibility of earning a steady income (Jacob, 2008).

The evidence from the *Yigong-Daizhen* programme in China (Chau *et al.*, 2014), and the Productive Safety Net Programme (PSNP) in Ethiopia (Deshingkar *et al.*, 2015; Slater *et al.*, 2006) has also contributed to the debate. For example, in the case of China, Chau *et al.* (2014) found that the *Yigong-Daizhen* programme increased migration: those neither too poor nor too rich could complement their own income with that from the *Yigong-Daizhen* and have enough money to migrate. In the case of the PSNP, the evidence shows that it provided a safety net for vulnerable populations since it enabled old people to stay put, instead of migrating as a coping strategy during the lean season (Deshingkar *et al.*, 2015). This evidence suggests that the efficient implementation of

public work programmes was a key factor that led to a reduction in migration. The income from the PSNP in Ethiopia (when it arrived on time) enabled households to avoid distress migration.

Finally, the evidence on public works programmes suggest that such interventions reduced or influenced migration unintentionally, not by the provision of jobs directly but by the type of projects that were implemented. For example, in India certain projects have positively impacted on local livelihoods through, for example, an improvement in soil fertility (Jacob, 2008) or water irrigation (Centre for Science and Environment, 2008). In contrast, in China, Chau *et al.* (2014) found that migration increased, especially in villages where the public works improved connectivity to neighbouring cities and villages. Therefore, where programmes improved local livelihoods, they contributed to a reduction of migration while, in contexts where the programmes were not oriented directly to the improvement of the living conditions of beneficiaries, migration persisted or increased.

#### 2.1.4 Social insurance

Other studies have focused on the provision of contributory social-insurance programmes. Sana and Massey (2000) and Sana and Hu (2007), in their studies from Mexico, found that having access to a private pension or a government social-security programme decreased migration to the USA. On the other hand, not having access to such a programme produced the opposite result. Those with social-security coverage decided to stay because they had jobs with benefits that were worth keeping. Although most migrants are young and do not contemplate retirement in their decision to migrate, both studies consider social security as an equivalent indicator of job formality. For both young and older Mexican migrants, the economic rewards of international migration are more appealing than the risks of quitting an informal job. These studies found both that not having access to formal jobs in the areas of origin increased migration and that those who stayed in the USA for more than ten years perceived migration as a possibility to save money or to have access to the receiving country's retirement system. Therefore, migration to the USA seemed to be a substitute for social security. Similarly, Hagen-Zanker *et al.* (2009) found that an increase in social-insurance coverage reduced migration in Albania.

Greenwood and McDowell (2011) included age and the skills of individuals in their analytic variables. Conducting a macro-economic study of 82 source countries, they

found that, when more social-insurance programmes were available in the country of origin, the average skill level of migrants tended to be lower. Therefore, those with greater skills, who could afford to contribute to a social-insurance scheme, did not migrate. Overall, the evidence on social insurance indicated that the more coverage there was in the country of origin, the less need a person had to migrate. However, for those who migrated, it was unclear whether the lack of a social-insurance benefit was an additional incentive for their decision-making, or whether it was caused more by the lack of a formal job. It is also unclear how the provision of certain types of insurance can impact on individuals with different age and skills' characteristics. Greenwood and McDowell (2011) and Greenwood *et al.* (1999) offered some insights into this area.

## **2.2 Lessons from the literature and factors behind the different outcomes**

The available literature has offered some valuable insights into how a number of factors can explain the different outcomes. From the literature, four important factors can be identified that shape how social-protection programmes impact upon migration:

- the characteristics of beneficiaries;
- the design of the programme;
- the implementation of the programme; and
- the wider context.

### *2.2.1 The characteristics of beneficiaries*

The characteristics of the beneficiaries matter. The South African Old Age Pension showed, for example, that, when the pensioner was a female, the likelihood of other members of the household migrating increased, especially other women (Ardington *et al.*, 2009; Posel *et al.*, 2006; Sienaert, 2008). The evidence of the SAOAP suggested that female beneficiaries usually shared their income with other members of the household or with absent members (Posel *et al.*, 2006). Therefore, another important lesson from the South African case is that an analysis of the effects of social protection on migration should include the household as a unit of analysis, not only those individuals who are the main beneficiaries.

### *2.2.2 The design of the programme*

The literature encompassed social-protection programmes that differed in their design and this influenced which members of the household migrated and which stayed and for

what purposes. This was related to the conditions attached to some programmes. For example, in the case of some CCTs, households could find it difficult to collect the transfer if some members migrated (*Procampo*, in Gonzalez-Konig and Wodon, 2005). In other cases, the conditions only bound certain members of the household to remaining behind while others were able to migrate, as shown by Winters *et al.* (2006) in Nicaragua.

The size of the transfer was also a factor that, the literature suggests, highly influenced the outcomes regarding migration. In some cases, the size of the transfer was too small to finance migration (Deshingkar *et al.*, 2015). Elsewhere, when transfers were perceived as a secure and representative source of income, they reduced the household's credit constraints, enabling them to invest in migration, as was shown by the case of the Old Age Pension in South Africa (Ardington *et al.*, 2015) or the Nicaraguan Social Protection Network (Winters *et al.*, 2006). However, the transfer was also significant for other households and their members who, instead of choosing to migrate, decided to stay. In Ethiopia and Malawi, the transfer of the Productive Safety Net Programme and the *Mchinji* Cash Transfer, respectively, offered the poor the option of staying instead of migrating to low-paid jobs and undertaking insecure and poor types of migration (Deshingkar *et al.*, 2015). Therefore, the design of the programme also matters.

### 2.2.3 *The implementation of the programme*

The different impacts shown in the literature can also be explained by either the effective or the ineffective implementation of the social-protection programmes. Social-protection interventions have the potential to reduce short-term migration (see Papp, 2012 for India), or distress migration (Slater *et al.*, 2006 for Ethiopia) when programmes are well implemented, otherwise migration could continue or even increase (IAMR, 2007 for India).

### 2.2.4 *The wider context*

The existing evidence has highlighted that context highly influences the intended outcomes of social protection. In situations of shock, as shown in Nicaragua (Winters *et al.*, 2006), poverty, in the case of Ethiopia (Deshingkar *et al.*, 2015), or uncertainty, as in India (Jacob, 2008), the provision of a social-protection programme tended to increase migration. Likewise, some of the evidence indicated that beneficiaries decided whether or not to migrate depending on the context of their places of origin. For

instance, in India, beneficiaries agreed they would not migrate if there were enough jobs locally, even if the salaries provided by MGNREGA were lower, suggesting that the daily costs of migration could be higher than staying put and working in the villages (Papp, 2012).

#### *2.2.5 Gaps in the literature*

The evidence provided on the linkages between social protection and migration flows is not linear. Even when only one type of social-protection programme is evaluated, the outcomes are unclear. This could be because most of the studies into the impact of social protection on migration employed quantitative methods. Very few studies employed mixed or qualitative methods that could be useful in providing context to explain the diversity of the outcomes. Some exceptions include the studies of the Centre for Science and Environment (2008), Deshingkar *et al.* (2010, 2015) and Jacob (2008). Very few studies provided a description of the villages or fieldwork areas together with profiles of other factors that could have led to migration. Most of the studies mentioned the persistence of poverty or deficient agricultural conditions in the areas of study, but very few offered an entire picture of the social structure, and of the cultural or agro-economic processes that could have influenced migration (two exceptions are Deshingkar *et al.*, 2010 in India and 2015 in four African countries). While, as previously mentioned, one important factor that mediates impact was context, very few of the studies provided details on this.

Furthermore, most of the studies do not consider the type of migration that may be generated by the social-protection programme. For exceptions see, for example, the case of Malawi (in Deshingkar *et al.*, 2015) and of South Africa (in Posel *et al.*, 2006). This is important because the evidence suggests that social protection has the potential to change migration in desired ways or even to reduce it. For example, in Malawi the migration of adolescent girls and boys may have shifted from forced migration for marriage and labour to migration for education (Deshingkar *et al.*, 2015). In Ethiopia, the Productive Safety Net Programme, when implemented properly and on time, was able to reduce the migration of poor households and enabled them to invest in their own livelihood activities, thus avoiding low-paid casual labour or having to harvest their crops prematurely (Slater *et al.*, 2006). In India, MGNREGA provided additional employment opportunities for women, thus reducing distress migration (Parida, 2016).



Other important factors, such as the length of exposure to either the programme or to any tradition of migration have generally been ignored. For example, studies do not differentiate whether households have been beneficiaries for a short, medium or long period of time. Most of the studies overlook the following factors influencing the decision of individuals to migrate:

1. the presence of social networks in the migration process;
2. the perception of migration as a deep-rooted community and family tradition;
3. the type of migration that some individuals or locations have undertaken even before the implementation of a social-protection programme; and
4. other factors (such as any available job opportunities or family responsibilities) that may have reduced the need for some households and/or individuals to migrate or, indeed, have prevented them from migrating.

All these factors need to be accounted for. An urgent need exists to include in the analysis how existent migration flows impact on the outcomes of a social-protection programme, or what the other factors might be that influence the decision to stay or to migrate for the household and its different members. Therefore, this thesis will include these overlooked factors in the analysis.

### **2.3 *Oportunidades* and migration: what we know about their mutual effects**

This thesis aims to disentangle the migration decision of the beneficiaries of *Oportunidades*, as well as to illustrate their life trajectories after the programme. Most of the studies on this topic have focused on the effects that *Oportunidades* has on migration, ignoring the circular relationship between the two. I will now discuss the evidence regarding this relationship, which will form the context for the main empirical findings of my thesis.

#### **2.3.1 *The effect of Oportunidades on the decision to migrate***

Generally, most analyses of this topic have focused on whether the programme increases or decreases migration. A range of possible reasons has been identified which explain how *Oportunidades* has decreased migration, focusing especially on its first years of implementation. Behrman *et al.*, (2008) and Martinez (2000) found that beneficiaries of the educational component remained in their areas of origin, as they gave preference to continuing with their studies. Similarly, Rodriguez-Oreggia and Freije (2012) observed that those with long-term exposure to the programme were more

likely to stay in order to complete their education. Other studies also observed an impact on the heads of households, who often migrated to work. For example, Martinez (2000) indicated that larger transfers tended to postpone the return of the head of household to the USA. Similarly, Stecklov *et al.* (2005) found that the programme, at least in its initial stages, motivated the head of household *not* to migrate to the USA, due to the improvement in the economic conditions of the household and because the attached health conditions required them to stay in order to continue receiving the food grant. As already mentioned, households can receive the nutritional component only when all members have attended periodic health checks and public health lectures. However, it is important to notice that, although the attached health conditions for all members of the household have been *de facto* rules, the programme has become more flexible during its development, allowing non-direct beneficiary adults (who tend to be male and to migrate) to forego the health conditions, as shown by Angelucci (2012). However, by the time that the studies of Martinez (2000) and Stecklov *et al.* (2005) took place, *Oportunidades* was in its initial stages, when household beneficiaries were still likely to believe that there was a likelihood that they would lose their benefits if any member of the household missed the health check-ups. Therefore, school attendance, improvement of the economic situation of the household, and the conditions of the programme seem, in these cases, to keep beneficiaries and other members of their households in their areas of origin.

Other studies have found that *Oportunidades* had the reverse impact and increased migration. The results provided by Angelucci (2004, 2012) showed that the transfer reduced credit constraints for households that otherwise would have not been able to migrate. The transfer was not used to finance migration directly, but its entitlement (the guarantee of a transfer for at least two years) provided these households with access to loans with which to finance USA migration. As a result, *Oportunidades* increased the migration of low skilled-individuals (for example, the head of household) whose household members were usually the target of the programme but were not themselves required by the conditions to remain in the country of origin. Therefore, the grant has allowed other non-direct beneficiaries of the household to migrate. The same study of Angelucci (2012) found no impact on internal migration because it was a less-expensive investment. However, the study overlooked the fact that internal migration might also

be costly, as it involves initial expenses or depends on social networks or the availability of jobs.

Another factor that explained an increase in migration was the effect of the programme on the creation of human capital (Azuara, 2009; Stecklov *et al.*, 2005). It has been found that beneficiaries with a greater number of years of schooling were more likely to migrate, attracted as they were by higher wages abroad than in their locations of origin (Angelucci, 2012; de la Rocha, 2009). These beneficiaries, this thesis will show, are affected by an increase in education that influenced their decisions to migrate. However, other factors which *Oportunidades* cannot control can also be important.

In contrast to the literature arguing for a restraining effect on migration, evidence also existed to indicate that *Oportunidades* increased migration by:

1. reducing credit constraints;
2. increasing the human capital of direct beneficiaries; and
3. creating the conditions that were not binding for all members at home, allowing some to migrate.

In addition, *Oportunidades* also affected the migration dynamics of different members of the household in both the short and the long term.

### 2.3.2 Factors behind the different outcomes

Again, several possible reasons exist to explain the different results of the studies. These factors reinforced the importance of looking at the context in which the social-protection programme is implemented. Here I set out the possible outcomes that are triggered among different members of the household.

- 1) The outcomes might differ according to the component of the programme that is evaluated – the nutritional component tended to increase migration in the short term, while the educational component reduced it (Angelucci, 2004).
- 2) The size of transfer and the degree of poverty of the households varied depending on the sample, resulting in different decisions being made (Angelucci, 2012; Stecklov *et al.*, 2005).
- 3) The time of exposure to the migration process was crucial, with areas of long-term migration seeing a reduction in the numbers of people leaving (Stecklov *et al.*, 2005) due to their improved incomes, while more-recent and less-wealthy sending areas saw an increase (Martinez, 2000).

- 4) The locality where the studies were undertaken may also influence the result. For example, some quantitative studies (Angelucci, 2004; Behrman and Hoddinott, 2005; Parker and Scott, 2001; Stecklov *et al.*, 2005) presented the results of six out of 32 states mainly located in the central part of the country, ignoring those states – like Oaxaca and Chiapas – with a more longstanding history of migration and particularly high levels of poverty (Azuara, 2009). These states were included in qualitative evaluations (Bañuelos, 2006; de la Rocha, 2009) along with other 11 states. However, even within one same state, migration flows can differ between regions and between the various areas of a same region, as this thesis will show.
- 5) Studies offered different results depending on whether the impact of migration was evaluated at the household level – incorporating different members of a family (Angelucci, 2012) – or at the individual level, and specifically on those beneficiaries who were entitled to the educational component (Rodriguez-Oreggia and Freije, 2012).

### 2.3.3 Gaps in the literature

The literature on *Oportunidades* has shown that the programme has affected the human capital of individuals, the dynamics and income of households, and the migration decisions within the household. However, in this thesis I will focus specifically on the educational component of *Oportunidades* as a factor that motivated beneficiaries to migrate. I will also examine how the availability of a conditional cash-transfer programme may have influenced beneficiaries' life aspirations and decision-making. As I explained in the previous chapter, the largest transfer of *Oportunidades* is directed towards education. These beneficiaries are specifically targeted to help to break the intergenerational transmission of poverty – one of the main aims of the programme. Furthermore, it has been predicted that these beneficiaries are the ones who would migrate, as a result of an increase in their human capital (Angelucci, 2012; Azuara, 2009; de la Rocha, 2009; Rodriguez-Oreggia and Freije, 2012). The literature looking at the long-term effects of the programme on these individuals – exploring their income and insertion in the labour market, both when they stayed (Ibarraran and Villa, 2009; Rodriguez-Oreggia and Freije, 2012) and when they migrated – has grown (de la Rocha, 2009; Parker and Gandini, 2009; Yaschine, 2012). However, the scarce empirical data examining the aspirations and decisions that former beneficiaries took upon completion

of the programme create a gap in the literature on *Oportunidades* and migration, a gap which this thesis will attempt to address.

While the existing literature gives a glimpse of the reasons that these beneficiaries had in mind when migrating, it does not show the circumstances under which they took that decision. Labour, education and marriage have been the main motives identified, but little is known about whether *Oportunidades* had a direct influence on these decisions, what the other factors were that could have motivated beneficiaries to migrate, and the dynamics that facilitated certain types of migration and not others – for example, labour over educational migration or domestic over international. Very few studies considered that the programme was implemented in locations where migration was already present or in households which considered migration as an entrenched tradition (some exceptions are Bañuelos, 2006; Martinez, 2000; Meza and Pederzini, 2009; Stecklov *et al.*, 2005). Therefore, while this literature has found that *Oportunidades* does impact on migration, there is a missing link: What are the factors that might be influencing the aspirations and the decisions of beneficiaries to migrate or not at the end of the programme? This thesis will try to address this gap.

All this evidence supports the need for more contextualised research on the decisions that individuals take after the programme, what influences them and the life trajectories that they follow. Qualitative and ethnographic studies can provide the grounds on which to understand the factors that play a role in the aspirations and the decisions that beneficiaries take during and after the programme. The aim of my research is not to look at whether *Oportunidades* increased or decreased migration but to find out how the programme influenced the *decision* to migrate, if at all, and what the trajectories were of the beneficiaries of this study after completion.

## **2.4 Theoretical framework**

Where social protection and migration have been conceptualised, the focus has been on the existing role of social-protection mechanisms available to migrants and their families in source and destination areas as a tool to decrease risk and vulnerability (Sabates-Wheeler and Waite, 2003). Migration itself has also been considered as a form of social protection, as it has the potential to give access to more-profitable job markets, reducing the vulnerability and risks for migrants and their families (Deshingkar *et al.*, 2010; Sabates-Wheeler and Waite, 2003). However, how social protection in the areas of

origin can influence decision-making around migration, and its role in areas of already-existing migration, has still not been understood.

For the purpose of my research, four theories will be used to disentangle the decision to migrate in the presence of conditional cash-transfer programmes: 1) the neoclassical model; 2) the new economics of labour migration (NELM); 3) network theory; and 4) the structure/agency theory from an aspirations and capabilities approach. These theories will be used to interpret, explain and test the empirical results of my thesis, with the aim of contributing to our understanding of how CCTs could influence or not the decision to migrate of household beneficiaries, especially for those who, upon completing the programme, might take the decision to migrate. The main postulates, contributions and flaws of each theory are identified here, in order to assist with our understanding, with the formation of hypothesis on the determinants to migrate for beneficiaries, and the possible role of cash transfers on the decision-making process.

#### *2.4.1 Neoclassical theories of migration*

Migration is explained by neoclassical economics as an individual decision based on a cost–benefit calculation, with the expectation of a positive net return, usually monetary, from movement (Massey *et al.*, 1993). The expected income in the destination country depends on the current (or average) earnings there, the probability of employment and the cost of migration abroad (Todaro, 1969; Todaro and Maruszko, 1987). It also depends on the characteristics of the individual (such as age, skill level and asset position) hence it varies by individual (Stecklov *et al.*, 2005). Migration is theorised as a form of investment in human capital in which people decide to migrate to where they can be the most productive, according to their skills. In neoclassical terms, the motivations for migration between Mexico and the USA are large: most Mexican workers can expect to earn three times more in the US than at home (Massey *et al.*, 1994a). Migration continues and does not stop until the expected earnings have been equalised abroad (Massey *et al.*, 1993).

Thus, if the cash transfer was unconditional without the prerequisite of the beneficiary being physically present to receive it, access to the programme would not be deemed to modify the decision to migrate (Stecklov *et al.*, 2005). However, a conditional cash transfer like *Oportunidades* alters migration for different individuals. For school-aged children, access to the cash transfer increases the value of staying at home for the years

for which they are eligible, reducing the possibility to migrate. Whether or not beneficiaries decide to migrate at the end of the programme depends on the level of skilled wages at home and in the destination locations (Angelucci, 2004). For adults, the requirement to be physically present (especially for the mothers who collect the money) also modifies the cost–benefit calculation, increasing the expense of migration through the loss of the food component of *Oportunidades* for the household. The effect is greater for individuals who migrate permanently or to the US than for individuals who migrate temporarily or to domestic destinations who can attend the yearly health check-ups more easily (Stecklov *et al.*, 2005).

However, the neoclassical model ignores the starting costs of the migration decision (Stecklov *et al.*, 2005). Before individuals can access the higher wages that are related to greater labour productivity, they first have to pursue certain investments, such as the material cost of travelling, the living costs while moving and looking for work, the difficulty in adapting to a new labour market, and the psychological costs (Massey *et al.*, 1993). If there are monetary costs attached to migration and if potential migrants have low levels of income, any additional income may relax the financial constraints, thus increasing migration. Hence, a reduction of credit constraints could cover the initial costs of migration and enable prospective migrants to move, as suggested by Angelucci (2004). However, at higher levels of income, where financial constraints are less meaningful, the additional income may act to reduce migration because it reduces the incentive to look elsewhere (Stecklov *et al.*, 2005).

However, other factors than simply income differentials enter the equation to shape the decision to migrate: migrant experience and network connections also play an important role (Massey *et al.*, 1994a). Thus, neoclassical theory is useful in understanding the importance of income in the decision-making of different individuals who benefited from *Oportunidades*, but it does not offer a complete explanation of the migration decision where other factors are also important.

#### 2.4.2 *New Economics of Labour Migration*

A theory that challenged the dominating economic view of neoclassical theory was the ‘New Economics of Labour Migration’ or NELM. According to the NELM, migration decisions are not individual but part of family strategies to increase income, earn funds to invest in new activities and insure against income and production risks. In addition,

remittances or the potential of receiving them, play a role in reducing the production and investment constraints faced by poor households (Taylor, 1999). While some family members are allocated economic activities in the local economies, other members are sent to work in external labour markets, where wages and employment conditions can support livelihoods in the local economy (Massey *et al.*, 1993). Thus, migration enables the introduction of a more diverse source of income in the household, while reducing risk through diversification.

Indeed, the NELM argues that its members migrate not to increase the household's absolute income but rather to improve its position (in terms of relative deprivation) with respect to its reference group (Stark and Taylor, 1991). Independent of relative deprivation concerns, households in Mexico compare their members with the labour markets in which the returns on their human capital are probably going to be the greatest (Stark and Taylor, 1991). Following this logic, the choice of the internal or international migration destination of *Oportunidades*' beneficiaries can be influenced by the location in which they expect the greatest return on their human capital.

If *Oportunidades* is viewed according to this model, the cash transfer could provide a source of income that is not related to the local economy, enhancing the capacity of the household to manage risk and reducing the need to diversify it through migration (Stecklov *et al.*, 2005). Indeed, the same authors suggest that *Oportunidades* might improve the household's liquidity through the transfer of a regular income which, according to the NELM, is likely to reduce migration for beneficiary households. However, these latter and those who increased their human capital could also be motivated to migrate, to reduce their relative deprivation in the place of origin, or to manage risk for their households, moving to destinations where they can obtain better returns on their human capital.

#### 2.4.3 Network theory

Nevertheless, for beneficiaries the decision to migrate can be also influenced by social networks that connect an individual with other destinations *before* he/she migrates, perpetuating migration movements over time, as suggested by network theory. According to network theory, the existence of migrant ties in origin and destination areas increases the probability of individuals migrating by decreasing the costs, increasing the benefits and lessening the risks of international movement (Massey *et al.*,



1994a). Once started, migration flows regularly become self-sustaining, reproducing the formation of networks of information, support and responsibilities which develop between migrants in the location of origin and family and friends in the destination area. Personal networks during migration expose the importance of social relations in the decision to migrate (Boyd, 1989).

According to the ‘cumulative causation of migration’ (Massey *et al.*, 1994b), each act of migration produces a series of irrevocable changes in individual motivations, social structures and cultural values that modify the context within which future migration decisions are made and generate conditions that make additional trips more likely. Over time, migration becomes less selective and more representative of the entire society. Empirical studies in Mexico show that networks are positively correlated with the decision to migrate. It is found that direct support such as money, housing, transportation, and food is regularly offered to migrants by these networks, decreasing their costs of migration (Boyd, 1989; McKenzie and Rapoport, 2010; Winters *et al.*, 2001). Hence, because migrant networks seem to play a noteworthy role in migration, the influence of *Oportunidades* on the beneficiaries’ decision to migrate may be affected by the existence of deep-rooted networks.

#### 2.4.4 Structure/Agency

Finally, the fourth theory that will be used to interpret my data is the structure/agency theory. De Haas (2011) highlighted the importance of connecting structure and agency in migration theories, with a focus on the aspirations and capabilities to migrate. Structure is defined as ‘any recurring pattern of social behaviour; or, more specifically, to the ordered interrelationships between the different elements of a social system or society’, a definition which leads to the existence of institutions in societies which are ‘clusters of norms and meanings, drawn from the culture that define the expectations that people hold about each other’s behaviours’ (Scott and Marshall, 2009: 228). Incorporating cultural norms in the analysis of beneficiaries’ migration decision-making is useful because they shape aspirations that are never simply individual, but are shaped in interaction with social life and are part of a system of local ideas and beliefs (Appadurai, 2004). Likewise, ‘factors such as states and policies, economic and social inequalities as well as networks have a strong structuring effect on migration’ (de Haas, 2011: 22).

Agency, on the other hand, has been usually understood as a synonym for action (Scott and Marshall, 2009). Giddens (1984) argues that agency

refers to doing ... the consequences of what actors do, intentionally or unintentionally, are events which would not have happened if that actor had behaved differently, but which are not within the scope of the agent's power to have brought about (Giddens, 1984: 11).

Action depends upon the capability of the individuals to 'make a difference' to a pre-existent state of events.

It is reasonable to hypothesise that *Oportunidades* might affect other dimensions important to individuals' capabilities. For example, it may increase school, nutrition and health levels as well as provide an extra income to households. In addition, *Oportunidades* might also affect individuals' aspirations, principally through an increase in education levels and its promises of better life conditions and success. De Haas (2011) argues that, if this process overlaps with the existence of noteworthy differences in structurally determined spatial opportunity differentials, then aspirations to migrate are more likely to emerge in an attempt to achieve these life aspirations. Conversely, when people do not aspire to other lifestyles 'elsewhere', even if they look 'objectively' or 'materially' more interesting, this will not translate into a desire to migrate. A focus on aspirations and capabilities helps to integrate concepts of agency and structure, considered to be one of the main challenges for advancing migration theory (de Haas, 2011).

To sum up, the way in which *Oportunidades* might influence the decision to migrate differs according to each theory and is not possible to predict. From the theoretical models and the available evidence on this topic, the influence of a cash transfer such as *Oportunidades* on the migration decision-making of its beneficiaries might depend on: 1) the initial level of poverty; 2) the presence of social networks; 3) the context of the sending and receiving localities; 4) the design and implementation of the cash transfer; 5) the length of exposure to the programme and to migration; 6) beneficiaries' and households own characteristics; and 7) households' or individuals' aspirations and capabilities. Within this frame, I will undertake my goal of researching this relationship between *Oportunidades* and migration, and to understand their mutual effects.

## 2.5 Summary

This chapter began by showing how the decision to migrate is influenced by social-protection programmes, but that the outcomes are not linear; it remains far from clear whether access to social protection has a direct or causal effect on any decision to migrate. The outcomes of the various studies differ due to their methodology and the type of social protection that is evaluated; however, this review also identified other factors, including the characteristics of the beneficiaries, the design of the social-protection programmes, the quality of their implementation and the context in which they have been implemented.

This chapter has shown that much has been written about the impact of *Oportunidades* on migration but that this had tended to concentrate on economic factors. However, other factors, and the circumstances under which beneficiaries decided to migrate or not, have been ignored. I have argued that a qualitative and ethnographic approach to uncovering the different factors and outcomes is necessary. I have also discussed theories of decision-making around migration, to allow us to consider how *Oportunidades* might play a role, and the other factors that could be involved in the decision-making process. The decision to migrate has been often analysed from the perspective of individuals suffering from poor socio-economic conditions and who have no option other than to migrate, ignoring the fact that conditional cash transfers often increase the human capital and income of their beneficiaries and households. These theories will be useful when examining the aspirations and decisions of a new generation of individuals exposed to the benefits of cash transfers, but immersed in the unequal structures of rural areas.

# 3

## Methodology

My research is based on a multi-sited ethnography with a mixed-method approach. The flexibility and the intimate knowledge offered by this approach gave me a comprehensive understanding of the mutual impacts between *Oportunidades* and migration, and the life trajectories of its beneficiaries. The methodology adopted in this study distinguishes it from studies that have previously explored migration and *Oportunidades*, where the empirical evidence is largely quantitative, thus providing limited qualitative support that could enable a better understanding of the everyday realities of people involved in the programme. The methodology for this research has aimed to include a variety of cases in order to explore the realities of life for beneficiaries coming from different localities and households, and to identify the divergence as well as the convergence of their stories.

After introducing the advantages and challenges of multi-sited ethnography, I will describe my own journey during my fieldwork and the methods that I employed to collect, triangulate and interpret my data. I also consider my positionality in the different sites where I conducted fieldwork. Finally, in the last section I examine the ethical issues that arose from my fieldwork and how I dealt with them.

### 3.1 Multi-sited ethnography

The traditional way in which fieldwork has been interpreted and carried out – through exploring different, and possibly related, sites of work before selection – is already, itself, potentially multi-sited (Marcus, 1995). The essence of multi-sited research is to follow people, connections, associations and relationships across space (Falzon, 2009). Marcus (1995), who propagated the concept of multi-sited research, described it as

designed around chains, paths, threads, conjunctions, or juxtapositions of locations in which the ethnographer establishes some form of literal, physical presence, with an explicit, posited logic of association or

connection among sites that in fact defines the argument of the ethnography (1995: 105).

He describes different modes or techniques for conducting multi-sited research through following: 1) the people, 2) the thing, 3) the metaphor, 4) the plot, story or allegory, 5) the life or biography and 6) the conflict. The way my thesis was designed was through following the people, as I did this across both physical borders and across cultural, linguistic and identity borders. This thesis was also methodologically inspired by the technique of tracing stories and biographies, as those of my participants, when possible, were narrated by not only them in the different field sites, but also by their relatives in their locations of origin.

Multi-sited ethnography has generated much discussion in the field of anthropology. For example, one criticism that Marcus (1995) himself acknowledged is that it is possibly a methodology going beyond its limits by trying to represent a broader system superficially, practicing fieldwork intensely at each site, and jeopardising the quality of the fieldwork. Other researchers, such as Candea (2009) and Falzon (2009), agree with Marcus' argument, although there are also other scholars who do support multi-sited ethnography. Hannerz (2007) argues that multi-sited ethnography mostly requires a careful selection of sites from among the many that could have been included, paying attention to particular problems or opportunities for comparison. For example, by following unpredictable trajectories, new insights and circumstances might develop that favour one site over another. O'Reilly (2008) highlights that multi-sited ethnography allows the researcher both to search for an object or idea and to follow the stories or people who emerge or travel across time and physical boundaries. In a more recent article, Marcus (2011) demonstrated that multi-sited ethnography contributes to the development of networks that enable the fieldworker to find him- or herself at different sites of interest across the evolution of the research. Before addressing the advantages and challenges I faced employing multi-sited research, I will briefly examine its contribution in migration studies.

The anthropological studies included in Watson (1977) highlighted the importance of undertaking fieldwork in multiple locations. Watson (1977: 2) stated: 'It is impossible to gain a true picture of immigration as a process without investigating the people and their families on both sides [of the migration trajectory]'. Likewise, Rouse (1991) stressed the importance of seeing migration not as a movement between distinct

environments but as a circuit in which the events taking place in the destination area affect the locations of origin and *vice versa*. These authors both highlighted an inadequate representation of the world in the social sciences – as a fragmented space, divided and each embedded in its proper culture and society.

Inspired by earlier studies on migration that employed a multi-sited ethnography (e.g. Gallo, 2009; Riccio, 2011; Watson, 1977; Weiskoppel, 2009), I decided that this methodological approach was the most useful for my research. In spite of the existence of studies that employed ethnographic methods when evaluating *Oportunidades* (e.g. Bañuelos, 2006; de la Rocha, 2009), most of them had only looked at the results of the programme in the places where it was implemented. Thus, I opted for multi-sited ethnography, as the focus of my research is not only at origin but also at destination, along with my interest in the decisions of its beneficiaries from two rural municipalities: Tama and Tlahui.

Both towns show high migration flows but with different characteristics and destinations. The sources of their remittances have also impacted on the towns in a variety ways. These differences and their importance for explaining the results of this research could have not been fully explored without employing multi-sited ethnography. My fieldwork was conducted in Tama and Tlahui over a seven-month period (four months in Tama followed by three in Tlahui). Due to their proximity, I was also able to go to the hamlets of Lindavista and Tejas during the first few months when I required it; however, my stays there were shorter, as the essential part of my fieldwork took place in Tama and Tlahui. Over those seven months I travelled to Oaxaca City at the weekends to interview participants from Tama and Tlahui who had migrated there. After completing this phase of my research, I moved to Mexico City, where I stayed four months conducting fieldwork, before finally moving for 10 days to Los Angeles, California, to interview international migrants.

During my fieldwork I experienced some of the challenges that can occur when conducting multi-sited ethnography. First, multi-sited research often means multi-lingual research (Marcus, 1995). Even though most of my informants spoke Spanish in the different locations, their mother tongue was *Mixe* and I was unable to learn the language in such a short length of time. This was not an obstacle when interviewing young participants but it was, in some cases, when interviewing their mothers – a translator was needed on these occasions.

Second, the time factor and the pressure of undertaking fieldwork in different places within a limited period of time (Hannerz, 2007) was a constraint. Fortunately, during the seven months of my core fieldwork, the localities I visited were close to each other, and the commute to Oaxaca at the weekend was only a two-hour journey by car. Likewise, as a native of Mexico City, I benefited from knowing the area and the neighbourhood where my participants were located.

Third, as experienced by Gallo (2009), my initial methodological and research choices did not remain the same at all sites, nor did my relations with people. The way I accessed the different field-sites were not the same, and my methods had to be changed, improved or discarded according to the context, the person or the circumstances, as I will explain later in the chapter. I had to modify, recreate or innovate, constantly testing the limits of my creativity at the different sites. Every site was a new adventure, with its own methodological doubts, challenges and opportunities to go in new directions. Certainly, conducting multi-sited research was challenging, as ‘getting off the verandah may involve a longer trip than Malinowski probably ever thought necessary’ (Falzon, 2009: 10).

However, I was also able to benefit from this approach in several ways. First, a multi-sited approach allowed me to place myself in a translocal network of relationships (Hannerz, 2007; Marcus, 2011). Not only was I able to talk with the participants who were my main interest (the former beneficiaries of *Oportunidades*), but they appreciated that I had also talked to family, friends and people they knew back in their towns, often more recently than they themselves had, in fact. Second, a multi-sited approach enabled me to identify and compare particular problems or opportunities (Hannerz, 2007). Through my visits to different towns within the region, I carefully selected Tama and Tlahui from among the many others that could have been included. Thirdly, a multi-sited lens enabled me to focus my attention on the mutual impacts between the areas of origin and destination (Rouse, 1991; Watson, 1977). For example, I was able to see how the decisions taken in the town assembly or by the local authorities in Tama and Tlahui had an influence on those living either in the USA or within Mexico and *vice versa*, how the migrants and their livelihoods in the areas of destination had an influence on the towns.

Finally, I found useful the approach of Gupta and Ferguson (1992), which emphasises the interconnected nature of spaces. Accordingly, we can not only think about locations

as not being separate and autonomous, but can also examine how they are formed out of the interconnected space that already existed, and the process whereby a space achieves a distinctive identity as a place. This approach, applied to Migration Studies, allowed me to think about my locations of study as a demarcated physical space, with boundaries but also with a distinctive identity, an identity resulting from ‘clusters of interaction’ (Gupta and Ferguson, 1992: 8). I could thus see how Tama and Tlahui have developed different identities according to the ways in which they have interacted with, and beyond the borders of, the Mexican state. Finally, like Gallo (2009) and Riccio (2011), conducting multi-sited ethnography gave me the opportunity to identify the different types of migration that were taking place in my region of study, to see how the people in each location perceived their own migration process and that of others, and to learn the meanings which they gave to each destination area.

### *3.1.1 The beginning of the journey: fieldwork in Tama, Tlahui and Oaxaca*

In September 2013 I arrived in Mexico to start my fieldwork. In this first phase I organised meetings with various key informants such as scholars or officials of *Oportunidades* who could advise me about the research methods I had selected and the relevant literature, and how to gain initial access to the locations.

After a couple of weeks in Oaxaca, I decided to go, for the first time, to the *Mixe* region. The first town I visited was Ayutla, where my journey began, and where I lived during those seven months of fieldwork. I decided to live in Ayutla since it is known as the ‘door to the *Mixe* region’ and it was easier to commute to the towns, and to Oaxaca City, from there. Traveling from Ayutla to Tama took me 10 minutes, and 25 minutes to Tlahui. Therefore, logistically, to commute was easier. Indeed, in Ayutla I could analyse my data from a convenient distance.

I employed a number of strategies to gain access to the different sites. I was aware that the inability to gain access to the localities selected could have jeopardised the success of my research (Johl and Renganathan, 2010). Another concern emerged concerning the idea of doing research in my own country. Even though as a Mexican I was familiar with the context, which could thus reduce initial problems of access (Cotterill and Letherby, 1994), I was also concerned about other problems related to aspects of my positionality. These aspects could have affected my access to the field, as illustrated by



Siwale (2015: 10) and her research in her native Zambia: ‘Conducting research at home may not be a “comfy” affair’. I will discuss this point later in this chapter.

I was able to gain access to my field sites through four different channels. As advised by other researchers who undertook fieldwork in Oaxaca, the first thing I did was to introduce myself to the local authorities. Their approval of my request to undertake my fieldwork was essential both because they were official gatekeepers of the region and because they announced in town meetings that I was going to be around doing fieldwork. My second point of access, which I only employed in Tama, was through officials of *Oportunidades* and local staff. An advantage here was that *Oportunidades* officials provided me with a list of the full names of the former beneficiaries whom I was hoping to interview, and the local staff also offered me a space in which to introduce myself to the mothers during their usual meetings. During these meetings, I stressed that I was not part of *Oportunidades* and asked the local staff and the authorities to make clear this point to the mothers. Social skills were crucial in this process and, after a while, once I had gained their trust, the mothers showed me how to find the former beneficiaries named on my list. Once I had contacted the first former beneficiaries, they put me in touch with others and so it snowballed.

A third point of access was to regularly participate in the diverse activities of the towns. In Tama, my arrival coincided with the festivities for the Day of the Dead,<sup>8</sup> where I helped with the preparations in the church and walked around the town, visiting some of the families with whom I had already initiated a connection. In Tlahui, my arrival coincided with one of the local parties, which I attended, and I began to be noticed by the population.

Finally, my fourth entrance point was unexpected and one of the most fruitful of my fieldwork experience, though this only happened in Tama. A month after my arrival in Tama, the councillor responsible for education asked me about any connections I might have with musicians who would like to donate instruments to the children’s band. I had no such connections, but decided to start a crowd-funding campaign asking for

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<sup>8</sup> The Day of the Dead is celebrated throughout Mexico and refers generally to the period from 28 October to 8 November and more specifically to the combined liturgical feasts of All Saints Day (1 November) and All Souls Day (2 November) which form the heart of the celebration. The Day of the Dead centres around the construction of home altars and the adornment of the tombs of the dead. In their role as intermediaries between humans and the supernatural, the souls of the dead are believed to return at this crucial time in the yearly agricultural cycle when family and friends gather to pay their respects to the deceased (Morales and Mysyk, 2004: 885)

donations, which would enable me to buy some instruments. With the help of friends from Oaxaca and Mexico City, we made a video with the children of the band and circulated it around our networks. The result was that a renowned Oaxacan painter donated 49 brand new musical instruments to the children. This experience helped me as a researcher to establish a rapport with different members of the town, and to become involved in one of the most important activities for the *Mixe* people – music. It also gave me a way to reciprocate their hospitality, and not to only take something from them.

In Tlahui, access was slightly different, and easier, for three reasons. First, I had already gained experience of introducing myself to the local or school authorities. Second, the higher educational context of Tlahui's population, compared with Tama, made the fieldwork develop more easily. Third, Tlahui is a town that has been constantly researched, especially by linguists or anthropologists. The population of Tlahui is used to being interviewed and, in most cases, participants were eager to help me. Finally, in Oaxaca, as difficult as it was to track down migrants, I was helped by being given referrals from relatives or other participants whom I had previously interviewed. This 'snowballing' technique was my main means of contact in the different research sites.

Although snowballing was an effective method for locating participants, I was aware of its potential challenges, as other researchers have highlighted (Beauchemin and González-Ferrer, 2011; Biernacki and Waldorf, 1981; Groenewold and Blisborrow, 2008; Murray, 2006), especially because I required the knowledge of insiders to help me locate potential interviewees. For example, there could be ethical concerns when directly contacting potential participants to whom I had been referred and who might not be interested in taking part (Biernacki and Waldorf, 1981). In these cases, I asked my interviewees to first ask potential participants whether or not I could have their contact details. In other cases, when I was given directions to the workplace or the address of a potential participant, I first explained who I was, what the aim of the research was, and how I had located him or her, offering them the option to participate or not. Fortunately, I found that most potential participants were more trusting when I mentioned the name of the person who had recommended them, which also eased the way to an interview.

Another problem concerning snowballing is related to the representativeness of the sample and the extent to which it might be biased due to the use of certain social

networks (Biernacki and Waldorf, 1981; Groenewold and Bilsborrow, 2008; Murray, 2006) or – in the case of migrants – those who have close ties with their home community (Beauchemin and González-Ferrer, 2011). However, this technique allowed me to achieve a sample encompassing a wide variety of cases, since my participants were randomly selected (Beauchemin and González-Ferrer, 2011). Moreover, although, on some occasions, I was referred to individuals who did not match my eligibility criteria, they usually then referred me to someone who actually did and who, indeed, revealed unexpected and important characteristics or illustrated one of the different trajectories that I was interested in (Biernacki and Waldorf, 1981). Finally, as explained, I used multiple sources, apart from snowballing, to access and contact potential interviewees in the different fieldwork locations (Beauchemin and González-Ferrer, 2011). This enabled me to interview participants from different backgrounds, with a variety of trajectories and migration experiences, which I found very insightful and which enriched my data.

### 3.1.2 *Following participants to Mexico City and ‘Oaxacalifornia’*

After seven months in Tama and Tlahui I was still only halfway through my fieldwork. My next task was to find the former beneficiaries of *Oportunidades* who were located in Mexico City, together with those who were in Los Angeles.

Tracking migrants in Mexico City was an easier process but also posed a number of challenges – not the least because Mexico City is one of the biggest cities in the world (3,691 square miles). While migrants from Tama were mostly concentrated in the neighbourhood of ‘Santo Domingo’, migrants from Tlahui were more dispersed or lived on the outskirts of the city, which was difficult to access not only because of the distance but also because the area was known to be unsafe. However, access to both areas was made easier – talking about my experience in the towns, including who I met, what I ate, the local parties, or the latest events in the towns, facilitated my access to the migrants in Mexico City.

I used two main strategies. First, my informants from Tama, Tlahui or Oaxaca City helped me to contact my informants in Mexico City. A second point of access was through an association founded by migrants from Tlahui and aiming to help current migrants and their children. Although they had few connections with young migrants,

they were still able to put me in touch with some of my participants and to collect data from the generation who had migrated from Tlahui two or three decades earlier.

In the USA, my main target were migrants from Tama as, before arriving, I contacted some of them living in Los Angeles through my informants. Even though I also tried to contact migrants from Tlahui, I was not successful. First, none of my participants or acquaintances from Tlahui knew anyone in Los Angeles. Second, once in Los Angeles I contacted a musician who had lived in the USA for several years but he did not know anyone matching the eligibility criteria of the study.

Likewise, in the USA, I did not conduct fieldwork in the same way as in Mexico City for several reasons. First, the reality was that, because most of the migrants in the USA had an irregular legal status, they were extremely reluctant to reveal information to an outsider who claimed to be a student. They also worked very long hours and most had only one day off, which they did not want to spend giving an interview. Second, the physical effort required to conduct multi-sited ethnographic fieldwork began to take its toll; while in the USA I realised that I was already both physically and emotionally exhausted. However, during my short stay I was able to live in a house with people originally from Tama, which proved to be a very valuable experience. I could talk with them beyond the time of the interview, visit the places they went to, share their food, listen to their conversations in *Mixe* and Spanish, and have first-hand experience of their lives in Los Angeles.

### **3.2 Mixed-methods approach**

To collect the data for my thesis I employed a questionnaire, focus-group discussions (FGDs), semi-structured interviews and participant observation. The questionnaire was designed to gather information about the migration context of the locations, and the migration aspirations of current beneficiaries, and focus groups were used to gain insights into their lives. Interviews aimed to explore the decision to migrate and the life trajectories of former beneficiaries. Finally, participant observation was useful for understanding the context of each locality and for placing my data in their specific context.

As Lewis-Beck *et al.* (2004: 678) defined it,

Multi-method research entails the application of two or more sources of data or research methods to the investigation of a research question or to different but highly linked research questions ... its appeal lies in the possibility it offers in terms of increasing validity of an investigation.

I accompanied the use of mixed-methods with a triangulation strategy, with the purpose of obtaining multiple ‘data points’ (Camfield 2006), of cross-checking the reliability and validity of my data (Wray *et al.*, 2007) and of enhancing confidence in the ensuing findings (Lewis-Beck *et al.*, 2004).

As I have already shown, I mainly employed qualitative methods, as they have been used in research on migration to understand the motivations, social meanings and individual and community-level social action in migration situations (Castles, 2012). Using other methods that are not essentially quantitative (e.g. focus groups, well-being approaches) can reveal other significant features and provide a better understanding of other dimensions like violence, insecurity, discrimination, gender or powerlessness (Chambers, 2007). However, I also used some quantitative data because, as Tarrow (1995) argued, they can serve as a frame for a study which is primarily qualitative; they can serve to establish the representativeness of cases. Qualitative data can then serve to interpret any initial quantitative findings (see Table 3.1 which summarises how my research unfolded).

**Table 3.1 Research timetable**

Stage of research	Location	Method	Participants
First	Tama, Tlahui, Lindavista and Tejas	Questionnaire Focus groups Semi-structured interviews	Beneficiaries and non-beneficiaries Beneficiaries and non-beneficiaries Key actors with specialist knowledge
Second	Tama and Tlahui	Semi-structured interviews	Former beneficiaries and non-beneficiaries
	Oaxaca City		Mothers receiving <i>Oportunidades</i> and remittances
Third	Mexico City	Semi-structured interviews	Former beneficiaries and non-beneficiaries
		Semi-structured interviews	Key actors with specialist knowledge
Fourth	Los Angeles	Semi-structured interviews	Former beneficiaries and non-beneficiaries

### 3.2.1 Questionnaire

In the initial stages of my fieldwork I designed a questionnaire survey, the results of which are presented in Chapters 4 (context), 5 (Tama) and 6 (Tlahui). English and Spanish versions of this questionnaire are to be found in Appendices 1 and 2 respectively. The questionnaire was applied to current beneficiaries and non-beneficiaries of *Oportunidades* in Tama, Tlahui, Lindavista and Tejas who were in their final year of junior-high school, and to beneficiaries of Tlahui and Tama enrolled in their final year of senior-high.

The aim of the questionnaire was twofold. First, it enabled me to learn about the background of *Oportunidades*' beneficiaries and non-beneficiaries and to triangulate information provided in the focus groups about their aspirations. Second, I wanted to obtain primary data about the context of the localities (including their migration flows and educational levels of the population) in order to have a picture of the similarities and differences between the sites. To enable this, the questionnaire was divided into seven sections, observable in Appendix 1.

The questionnaire was semi-structured in its design, combining structured questions to obtain background information, along with others that were more open-ended, allowing participants to answer more freely and thus to convey ideas or perceptions in a flexible manner. These open questions were simply a small space in which a short reply could be written – for example, why did participants give preference to continuing their studies rather than to starting work (or *vice versa*). The questionnaire was filled out by the participants and not by me, because I wanted to give them a confidential space where they could freely describe their thoughts and decisions, or what their parents and town expected from them. However, I was present while the participants filled out the questionnaires as there were some benefits of being there in person. These included more information on the context of the focus groups, and the ability to motivate and guide respondents through the questions when necessary, and to maintain a rapport with them (May, 2011). However, in order to have a larger sample, the questionnaire was applied not only to participants of the focus groups but also to the rest of the students. All the questions were coded in Excel and the open questions using N-Vivo.

There are two important points about the data I collected. First is the issue of how representative the data were of the migration patterns of each location, the sample size of which is not representative of the entire population. My purpose was not to make any statistical claims based on the numbers but to obtain data about the trends and a glimpse of the migration patterns and educational levels of each location. Table 3.2 shows the number of participants who responded to the questionnaire in each location.

**Table 3.2 Summary of questionnaires**

<b>Location</b>	<b>School level</b>	<b>No. respondents</b>
Tlahui town	Junior-high	14
	Senior-high	10
	Total	24
Tejas	Junior-high	15
	Total	15
Tama town	Junior-high	36
	Senior-high	39
	Total	75
Lindavista (Tama)	Junior-high	13
	Total	13
	<b>Total respondents</b>	<b>127</b>

As can be seen from Table 3.2, the number of respondents at each locality differs because the sizes of the schools varied. Indeed, the application of the questionnaire depended on whether or not the school authorities allowed me enough time to apply it to the rest of the students and whether these latter were willing to respond. Therefore, I cannot claim that my sample is representative, but it certainly gave me a broad impression of the migration trends, the educational context of the localities, and the profiles of my focus-group participants.

The second point is related to the issue of how I used the information derived from the questionnaire to triangulate the data from the focus groups. I wanted to know the personal background of those who took part – for example, whether their parents or other relatives were abroad, who they lived with and/or their perceptions of relative deprivation. Since I considered these questions to be too personal, my aim was not to discuss these issues during the focus groups but to learn about their backgrounds

through the questionnaire. In addition, I could obtain a broader picture about their aspirations because it also applied to both beneficiaries and non-beneficiaries who took no part in the focus groups. As shown in Appendices 1 and 2, aspirations were captured through questions concerning, for example, the plans that participants had after finishing junior or senior-high school (to work, to continue studying or something else) together with the reasons why this decision was taken, the highest school level to which they would like to study and why, or the profession to which they aspired, including any obstacles that they considered could hinder the achievement of their life goals.

The data from the questionnaires and the focus groups together helped me to further probe potentially interesting issues that I could include in the design of the semi-structured interviews.

### *3.2.2 Focus-group discussions*

I conducted focus groups (in Tama, Tlahui, Lindavista and Tejas) with both beneficiaries and non-beneficiaries in their last years of junior and senior-high school. I chose focus groups because they could provide me with interesting data on potential migrants' aspirations, and help in 'understanding the feelings, comments, and thought process of participants as they discussed the issue' (Krueger, 1994: 12). Moreover, focus groups could enable me to give voice to marginalised groups, to debate issues relevant to them and to produce a collective testimony (Bagnoli and Clark, 2010). I also expected that the findings obtained would be useful for establishing questions for the in-depth interviews (Beazley and Ennew, 2006). I was aware that focus groups with young people could turn out to be somewhat unnatural or uncomfortable, since the activities were pre-defined and it was questionable whether participants would spontaneously talk about explicit topics such as peer pressure in the presence of an adult (Murray, 2006). To overcome this, I initiated each focus group with an ice-breaker activity to build rapport among participants and between them and myself as interviewer. In total, 13 focus groups were conducted across the four locations, as summarised in Table 3.3.



**Table 3.3 Summary of focus groups**

<b>Municipality of reference</b>	<b>School level</b>	<b>Total</b>	<b>Participants</b>
Tama (town)	Junior-high	2	Beneficiaries
		2	Non-beneficiaries
	Senior-high	2	Beneficiaries and non-beneficiaries
Tlahui (town)	Junior-high	2	Beneficiaries
		1	Non-beneficiaries
	Senior-high	1	Beneficiaries
		1	Non-beneficiaries
Lindavista (Tama)	Junior-high	1	Beneficiaries
Tajas (Tlahui)	Senior-high	1	Beneficiaries

I attempted to make the most of the limitations of the samples and use them to my advantage. As can be observed in Table 3.3, one problem was the recruitment of participants. As mentioned, I was interested in knowing the differences between beneficiaries and non-beneficiaries even though, overall, there were very few of the latter, especially in Lindavista and Tejas. Therefore, the data that I present in Chapters 5 (Tama) and 6 (Tlahui) are the results of the focus groups only with current beneficiaries. I also decided to focus my attention only on beneficiaries because I did not find remarkable differences in the aspirations of the two groups. Although I acknowledge that these differences exist, these did not emerge and could not be analysed by only using focus groups as a research method. These differences unfolded in the semi-structured interviews with former and non-beneficiaries, as I will show in the first sections of Chapters 5 and 6.

However, working with non-beneficiaries separately, when possible, would allow me to gain more insights into their perceptions of how the programme was used by their school peers and whether or not structural aspects affected both beneficiaries and non-beneficiaries alike. Likewise, in Lindavista all participants were female, since no males volunteered to participate – probably because they were not interested in the purpose of the study or the topic or because they felt uncomfortable talking with a woman whom they did not know. This limitation was, nonetheless, useful, as it allowed me to examine gender patterns in more detail, what girls in this context aspired to, and any problems they faced.

In the case of Tama, the focus-group discussions in senior-high school were conducted with beneficiaries and non-beneficiaries together because this was the first time I had conducted a focus group, and I was still inexperienced. When I asked the school authorities whether I could separate the groups, they said that they preferred not to due to time constraints. I overcame this with the focus groups I conducted in the junior-high school, making clear that I wanted to conduct them separately. In the case of Tlahui, focus groups were conducted with beneficiaries and non-beneficiaries separately in both junior and senior-high school. However, the participation of non-beneficiaries in junior high was not totally voluntary as there were very few of them; the teachers therefore intervened and encouraged them to participate. This could have biased their answers or their willingness to participate. However, the ice-breaker activities helped to create a rapport and they showed more interest in the topic after I explained the purpose of the research and what its aims were. Without the intervention of the school authorities, I would not have had access to these non-beneficiaries. Finally, another challenge regarding the recruitment of participants emerged when I explained the purpose of the study and the topics to be covered, before requesting that volunteers participate. I found that, in some cases, participants were not just those who had an interest on the topic, but also those who only wanted to miss class! However, creating a congenial atmosphere in these cases was essential if I was to stimulate their interest and engagement with the topic.

In addition, the flow and the contents of the focus groups were not the same in all localities and I found myself modifying the dynamics and interaction with my participants. For example, some groups or certain participants were more shy than others and I had to slightly modify the activities to encourage their intervention. With more practice, I realised that what worked in one locality was not going to work in another, or that my strategies for creating a good relationship with them, for leading the discussion and for collecting the data had to differ between settings and circumstances. The approach I used to conduct the focus group was inspired by Camfield (2006) and Copestake and Camfield (2010) and their work on well-being perceptions and aspirations. Focusing on well-being rather than on poverty has the advantage of helping researchers to explore what poor people have and are capable of doing, rather than homing in on their shortfalls, and should produce more credible and respectful representations of the lives of people (Camfield, 2006). In addition, it was a useful way

of triangulating the data I obtained from my key-actor interviews with those from the questionnaires. This approach also enabled me to create a space for participants to express what they thought they should be able to achieve, what they valued, what was important for them, and what a person from their locality needed to do in order to achieve these aspirations. Overall, I found this to a good way of generating data on aspirations and the decision to migrate.

As I was directing the discussion and collecting a large quantity of data at the same time, I decided to hire a research assistant who accompanied me during the focus groups and the interviews with the school authorities. She was a female graduate of anthropology with experience in conducting fieldwork in indigenous locations. I decided to hire someone who was not from the region itself but who had previous fieldwork experience in Oaxaca and a knowledge of migration studies. My reason for not taking on someone local was because I did not want to be identified with a local group or family. My research assistant was taking field notes during each focus group, paying attention both to the reactions of the participants, and to the details that I could not be aware of while conducting the discussions (e.g. gender relations, interactions between participants, and their greater interest in certain topics). Her experience of conducting fieldwork in other places was very helpful for my research because it led me to think about other possible explanations for and answers to my inquiries and to reflect on my positionality and its impact. After gathering and pre-analysing the data from the questionnaires and the focus groups, I felt ready to structure and start conducting the in-depth interviews.

### *3.2.3 In-depth interviews*

Although in-depth interviews as a research method have been criticised due to the likelihood of obtaining subjective data influenced by the type of interviewees, the strength of this method lies, if anything, in the possibility of gaining a mixture of views on a particular topic (Kvale, 1996). I decided to conduct in-depth interviews as this method would allow me the most interaction with research participants, a useful feature when studying migrant groups and their life experiences, perceptions and physical surroundings (Sanchez-Ayala, 2012). I also selected this method because I wanted to collect narratives about where individuals came from and where they planned to go, which seemed especially important for migrants

because they, perhaps more than others, need to give coherence and meaning to their experiences. In addition to this, narratives, like migration, are always characterized by movement, both within their internal form (from their start to their finish), and in the ways in which they are told (Gardner, 2002: 29).

Altogether I interviewed 119 people, face-to-face, in seven different places: Tama, Tlahui, Lindavista, Tejas, Oaxaca City, Mexico City and Los Angeles – in the USA. Interviewees included: 1) former beneficiaries and non-beneficiaries, located in Tama and Tlahui, most of whom were permanent or temporary return migrants, 2) former beneficiaries and non-beneficiaries in Oaxaca City, Mexico City and Los Angeles, 3) mothers in Tama who received *Oportunidades* benefits and remittances (internal or international), and 4) key actors with specialist knowledge about certain aspects of my topic such as teachers, local authorities, or the leaders of not-for-profit organisations. Table 3.4 shows a summary of the interviews, including the place where they were conducted and the role of the interviewee.

**Table 3.4 Summary of interviews**

<b>Municipality of reference</b>	<b>Current residence</b>	<b>Status of the interviewee</b>	<b>Number of interviewees</b>
Tama (town)	Tama	Former beneficiary with return migration	14
		Former beneficiary with no migration	3
		Non-beneficiary with return migration	5
		Mother receiving <i>Oportunidades</i> and remittances	19
		Key actor with specialist knowledge	10
	Oaxaca City	Former beneficiary	4
	Mexico City	Former beneficiary	3
		Non-beneficiary	4
	USA	Former beneficiary	3
		Non-beneficiary	3
Tlahui (town)	Tlahui	Former beneficiary with return migration	11
		Former beneficiary with no migration	2
		Non-beneficiary with return migration	3
		Key actor with specialist knowledge	11
	Oaxaca	Former beneficiary	3
		Non-beneficiary	3
	Mexico City	Former beneficiary	3
		Non-beneficiary	2
		Key actor with specialist knowledge	3
Lindavista (Tama)	Lindavista	Key actor with specialist knowledge	5
Tejas (Tlahui)	Tejas	Key actor with specialist knowledge	5

The structure of the interviews fluctuated between participants. In the case of former beneficiaries and non-beneficiaries, I designed them to be semi-structured. Kvale (1996: 5–6) described this type of interview as ‘an interview whose purpose is to obtain descriptions of the life world of the interviewee with respect to interpreting the meaning of the described phenomena’. Through this approach, I wanted to perceive the factors that influenced their decisions and the paths they followed. If the topics I was interested in or the phases of their lives that I considered important did not figure in their narratives, I asked them directly. With practice, I could identify the questions that were necessary and to introduce certain topics, or to guide the interviews in different ways depending on the personality of each participant.

The interviews with key actors and with the mothers receiving *Oportunidades* and remittances were designed in a more structured way, but which also allowed the participant to speak in more detail about the situations or topics that they considered the most important. Interviews about the use of *Oportunidades* and remittances (internal and international) were conducted with mothers receiving both incomes, but only in Tama, because I wanted to know how both incomes were used and complemented more than comparing this interaction in two different towns, which would have taken me longer.

There are some points that need to be clarified about this sample of former beneficiaries and non-beneficiaries. All the former beneficiaries interviewed were part of the first cohort of *Oportunidades* beneficiaries during its first years of implementation (1998–2001). However, not all completed the programme. Not all non-beneficiaries were comparable with beneficiaries. Some had a higher socio-economic status than beneficiaries or the head of household had a well-remunerated or stable job by the time the non-beneficiary was studying. However, I could not know this until I had an interview with them. Likewise, not all return migrants were planning to stay in the town permanently. Finally, in the case of Tama, return migrants were coming from other parts of Mexico, the USA or both, while return migrants from Tlahui were only coming from internal parts of the country.

After transcribing and analysing some of the interviews I decided to change the way in which I analysed my data – I began to use a case-study approach in order to go into greater detail. I considered the case study literature as the most adequate way to approach and analyse my data since the aim of my study is to find explanations, rather

than to develop a hypothesis or to predict a phenomenon (Yin, 2009). I considered this approach useful for my analysis because the case study's 'unique strength' is that it enables the researcher to deal with a full variety of evidence (such as interviews, focus groups and direct observation, in my own research), and because I was benefiting from prior theoretical propositions about my topic that were guiding my data collection analysis. In Yin's words (2009: 18) 'you would use the case study method because you wanted to understand a real-life phenomenon in depth, but such understanding encompassed important contextual conditions, because they were highly pertinent to your phenomenon of study'.

Case studies can be approached in different ways (Bryman, 2008; Opie, 2004). As such, I appreciate that their nature and status could be seen as unclear (Tight, 2010). Nevertheless, for the purpose of my research, the way I understand and employ the term 'case study' is more in line with that of Verschuren (2003), who has described it as a research strategy, different from and complementary to other strategies or research approaches. He defines the case study as:

a research strategy that can be qualified as holistic in nature, following an iterative-parallel way of proceeding, looking at only a few strategically selected cases, observed in their natural context in an open-ended way, explicitly avoiding (all variants of) tunnel vision, making use of analytical comparison of cases or sub-cases, and aimed at description and explanation of complex and entangled group attributes, patterns, structures or processes (2003: 137).

Therefore, I employed case studies, as my aim was to conduct a detailed examination of a smaller sample comprising those former beneficiaries who were incorporated in the programme between 1998 and 2001. These years of incorporation were preferred, because I was interested in those with a longer experience of the programme. During the first interview I could identify aspects of their lives that were of particular interest to me; I conducted more than one interview, or also interviewed other members of the same household as the 1998–2001 participants. Therefore, participants whose cases were studied in depth, and were incorporated into my smaller sample, had to:

1. have been a beneficiary of *Oportunidades* between 1998 and 2001 during primary school (third to sixth year) and to have been a resident of a beneficiary household

until his or her last year of formal education. Since I was looking for a variety of experiences, some participants completed senior-high school, while others dropped out of senior or junior high;

2. belong to households with a similar socio-economic background – specifically, to have been categorised as ‘poor’ according to the targeting of *Oportunidades* between 1998 and 2001, to have parents with similar levels of education, household heads with similar types of job at that time, similar access to land, or other indicators that made them comparable;
3. be a resident of the town at the time of the interview (2014); or
4. be a migrant with a minimum of two years living outside of the town in one of the selected destinations at the time of the interview. Table 3.5 shows the characteristics of the six participants selected for the case studies (three in each of Tama and Tlahui), according to whether they were return or current migrants, and their place of residence in 2014.

**Table 3.5 Summary of case studies**

<b>Municipality of reference</b>	<b>Current residence</b>	<b>Migration status of the interviewee</b>	<b>No. of participants</b>
Tama	Tama	Return migrant from international destination	1
	Mexico City	Internal migrant	1
	USA	International migrant	1
Tlahui	Tlahui	Return migrant from internal destination	1
	Oaxaca City	Internal migrant	1
	Mexico City	Internal migrant	1

In my analysis of the case studies, I examine the lives and experiences of the former beneficiaries, then compare them with those of the non-beneficiaries, paying attention to what happened in the entire household. This was important, since individuals do not live in isolation, but within a context of networked social relations, of which the family is central (Miller, 2007). I therefore focused on working out the details of my informant’s life, preferably in chronological order. My final aim while examining these cases was to find explanations that contributed to my understanding of the different, and sometimes, opposite findings of previous studies.

### 3.2.4 Participant observation

At the beginning of my fieldwork the most important thing for me was, on the one hand, to establish relationships of trust with the research participants and, on the other, to gain an understanding of the context. Participant observation was useful here, the data from which I could add to those from my questionnaires, focus groups and interviews. Participant observation enabled me to be better equipped to see as others see (Bryman, 2008) and to be involved in the daily activities of a group, revising potential explanations about how individuals interpret their lives and about the possible and obvious ‘reasons’ for any behaviour (Chadwick *et al.*, 1984).

Living in the region enabled me to gain a better understanding of *Mixe* society, their world view, and what they valued in their lives. Occasional chats with different members of each locality allowed me to identify aspects of their lives that were not mentioned in the interviews or focus groups. For example, I could pay more attention to the everyday activities undertaken by men and women – their rituals, their festivities – and observe migrants who returned for these special occasions. Participant observation also enabled me to accurately acknowledge the social difficulties, realities and consequences in their lives in relation to the implementation and development of *Oportunidades*, impacts which had been noted by previous qualitative evaluations (e.g. de la Rocha, 2009). I could also pay attention to the activities undertaken by *Oportunidades* staff, and how they affected the areas for which they were responsible. This technique was also important in that it enabled me to obtain information on how the *Oportunidades* payments were spent on the day they arrived, and the social dynamics they created.

This approach was also vital when I conducted fieldwork in Mexico City and the USA. I was received as a guest at the gatherings of my participants or other important events, or was able observe their daily activities in their workplaces, see what they did in their free time, what they ate, where they shopped, what language they spoke, their adaptation to their migration destinations, and other aspects of their lives in the cities. Observing also means involvement in the migrant locality and regular interaction with individuals, giving the researcher the opportunity to engage in the complexity of the lives of immigrants (Sanchez-Ayala, 2012). Participant observation was then highly useful, as I could acquire essential information (both beforehand and afterwards) regarding the daily lives and spatial circumstances of my interviewees.



### **3.3 A native returning to her ‘own’ country? Reflections on positionality**

Researchers conducting qualitative fieldwork constantly emphasise the essential requirement of reflection on their positionality and identity as a researcher (see Bettez, 2014; Marcus, 1995). This is because, as Berger (2015: 220) argues, fieldworkers need to ‘increasingly focus on self-knowledge and sensitivity; better understand the role of the self in the creation of knowledge; carefully self-monitor the impact of their biases, beliefs, and personal experiences on their research, and maintain the balance between personal and universal’. Bettez (2014: 935) describes positionality as an involvement of

the combination of social status groups to which one belongs (such as race, class, gender, and sexuality), and one’s personal experience (understanding that experience is always individually interpreted, and it is the interpretation that gives an experience meaning). Our positionalities – how we see ourselves, how we are perceived by others, and our experiences – influence how we approach knowledge, what we know, and what we believe we know.

One of the first steps before I began conducting fieldwork involved considering my positionality. Initially, I took into account my relevant characteristics as a researcher – such as my personal, social, economic and professional background – as well as those of my respondents. As my fieldwork continued, I experienced more difficulties when reflecting on my own positionality and realised that, in spite of being a Mexican and going back to my own country, I was not – most of the time – a real insider; I was both an insider and an outsider, conducting fieldwork at home but returning from a Western university, as experienced by Al-Makhamreh and Lewando-Hundt (2008) in Jordan, Crossa (2012) in Mexico, Lal (1996) in India, Turgo (2012) in the Philippines and Sultana (2007) in Bangladesh. As a result, I found myself facing multiple identities that I was not fully prepared for until I arrived to carry out my fieldwork.

I was an insider because I was in my home country and I shared with my participants a common language, Spanish. However, as Siwale (2015) highlighted, it would be simplistic to classify someone as an insider based solely on a common language. Indeed, in spite of the fact that a majority of my participants were bilingual and spoke Spanish, this was not their mother tongue. I was also an insider because, in my home country, the majority of the population is Catholic and I was raised within this context, like the majority of Mexicans. However, despite most of the population in my area of

study also being raised as Catholics, this religion interacted with local practices, rituals and beliefs that I did not share, so I was also an ‘outsider’. As my fieldwork progressed, I became more aware of my class, ethnic and educational privilege that reinforced my own view as an outsider. I grew up in the capital of Mexico, in a middle-class neighbourhood in the south of the city, I was *mestiza*,<sup>9</sup> and had been educated in private schools. In a country where being indigenous<sup>10</sup> and from a rural locality has meant being condemned to poverty and a lower status for centuries, I could hardly identify myself and then expect to understand the everyday struggles and challenges of many of my participants. However, I was also concerned about the injustices and economic disparities that were very easy to perceive when growing up in a middle-class household in Mexico City, a city that exhibits a kaleidoscope of social inequalities that permeates across the country.

Rubin (2012) argued that reflexivity requires the recognition that different positionalities are not mutually exclusive and that the researcher can be both an insider and an outsider in the same time and space. Not only did who I was or where I was coming from influence my identity as both an insider and an outsider, but my participants also crafted it in different ways, as experienced by other researchers (Crossa, 2012; Siwale, 2015; Turgo, 2012), creating a multiplicity of identities in a number of spaces (Rubin, 2012). For example, young, female participants who were also living away from ‘home’ could identify more with me and creating a relationship was easier. Likewise, other participants close to my age identified more with me when they discovered that we liked similar music, that we had been to the same places, or that we did similar things in our free time while living in Oaxaca or Mexico City. These roles of being closer as an ‘insider’ facilitated our relationship, and encouraged my informants to share problems – as Al-Makhamreh and Lewando-Hundt also experienced in Jordan (2008).

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<sup>9</sup> *Mestizo* is one of the racial categories in Mexico that date back to the colonial period: ‘In the Spanish colonies, the “*peninsulares*” were the Spanish-born who held the most important colonial offices. Next came the “*criollos*” people of Spanish descent born in the colonies. Below the “*criollos*” were the “*mestizos*” (mixed Spanish and Indian), while the “*Indio*” and the “blacks” held the lowest positions in the social/racial hierarchy. These racial categories remain fundamental in forming and reproducing class structures ... Race in Mexico intersects with other axes of difference, particularly class, which reinforces historically constructed labels of domination, exploitation and privilege’ (Crossa, 2012: 112–113).

<sup>10</sup> The indigenous in Mexico are also called ‘Indians’ as a pejorative racial slang. ‘Being an “*Indio*” (Indian) is sometimes used by *mestizo* and white populations to refer to someone who is stupid, backward or behaves in inappropriate ways’ (Crossa, 2012: 113).

Moreover, in contrast to other researchers who conduct fieldwork in Mexico and have white skin (e.g. Crossa, 2012) I was not identified as a *gringa*<sup>11</sup> or a *güerita*<sup>12</sup>, therefore I was not representative of the skin-colour privilege in the Mexican social hierarchy that is usually associated with higher economic and social status. However, for other participants I was not similar to them, and they constructed a different image of who I was. Some potential participants identified me as a member of *Oportunidades*, while others, especially in the USA, had a perception of me being privileged or being a threat, as I explained in the previous section about access.

Throughout the fieldwork, in spite of the different meanings that my participants gave to my identity and its implications, I had to constantly establish the only certainty I had about my identity: I was a Mexican student with a scholarship provided by the Mexican government to enable me to study in the UK. To answer questions about my identity was useful not only in building up a rapport between me and my interlocutors, but also in determining this clear identity. However, some people I talked to associated my studies in the UK with me having a lot of money, like other researchers returning to their home countries from universities in the UK (see Siwale, 2015; Turgo, 2012). However, to most of my participants, my most advantageous identity was being a woman and being a student because I was not threatening – they saw me coming and going by myself, and realised that my intentions were nothing more than academic. Being a woman facilitated the building of trust with my participants, especially when conducting interviews in their homes. In fact, after a while, when I became better known in the towns, they were happy when I requested an interview – some even invited me to stay over for lunch, coffee, or *mezcal*.<sup>13</sup>

All these different identities and perceptions created by my participants influenced not only the relationship between us but also the dynamics of the interview, and the information they shared. For example, at the beginning of my research, some of the mothers whom I was interested in interviewing suspected that I was working for *Oportunidades* and mainly stressed how important the programme was in their lives or how they struggled economically because their husbands were in the USA. On the other hand, some participants identified me more as a student and were very open and honest

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<sup>11</sup> Association of a white person with the United States.

<sup>12</sup> Racial slang to define someone who is white-skinned or blonde.

<sup>13</sup> A distilled alcoholic beverage made from the agave plant, which is native to Mexico.

during the interviews, as they were also interested in the topic. Likewise, participants of the focus groups who identified me as a student and who were interested in continuing their studies showed enthusiasm for the topic and shared their doubts about and challenges to achieving their aspirations in a more open way. Therefore, with some participants I had to ensure that they perceived me as a student and that the purpose of my research was purely academic.

Returning home to a country like Mexico (which is divided by culture, ethnicity, language, class and other forms of privilege) was conflicting as I found myself questioning, shifting and re-constructing my identity. Certainly, aspects of my positionality (such as being Mexican but not *Mixe*, being young, educated, middle-class and a woman) affected my access to interviewees, the relationships that we were able to build up, and the information that my informants revealed to me. However, over the course of my fieldwork I was able to learn how to use these multiple identities in ways which gave me access to particular information that, probably, a total insider or outsider might not have.

### **3.4 Power relations**

Part of recognising positionality also entails the identification of power relations in the research process (Crossa, 2012). Researchers have to be conscious of their privileged position *vis-à-vis* vulnerable research participants (McDowell, 1992; Sultana, 2007).

On the other hand, Turgo (2012) argues that participants of research can also possess power because they can define the researcher's access to and participation in the research site: 'Power stands on shifty ground and to assume that participants in research are passively nodding to the advances of researchers is a gross simplification of the dynamics of field relations' (2012: 677). Similarly, Guevarra (2006: 527) claims that

participants are not simply passive recipients of a researcher's claim of authority and intellectual agenda, but are active agents who can redefine the contours of the research, outline and restrict the researcher's role, or even steer the project in a different direction.

Therefore, research participants also have power and agency either through their ability to control the researcher's access (Turgo, 2012) and to create the identity of the researcher in whichever way they want (Siwale, 2015), thus redefining the shape of the

research (Guevarra, 2006) or by refusing to participate (Siwale, 2015). Becoming aware that both researchers and participants have different degrees of power over the other was an important consideration during my fieldwork, since it meant that I could recognise the different flows of power relations in our everyday encounters.

Being *mestiza*, educated and a student at a foreign university certainly situated me in a different hierarchical category. As I was conscious of the power relations attached to my position, I invested significant time and effort into how I related to my participants, always showing respect for them, being honest with who I am and what my interest was in their lives. The way I was able to connect with them and find ‘affinities’ between us enabled me to form relationships of trust that are important in fieldwork, as experienced by Sultana (2007). My positionality also facilitated my access to local universities, the staff of *Oportunidades*, and the local authorities in the various fieldwork locations.

However, I found this position also interacted with my other identities that interplayed in the different field sites, which also made me aware of reverse power relations. For example, I found myself in situations where the local authorities spoke about me or negotiated my entrance in to the *Mixe* world without me understanding the conversation, or when the only word I could understand was when people referred to me as an ‘*akats*’ or foreigner. On other occasions, the local authorities did not turn up at the interview or made me wait for hours. Women constantly warned me not to be by myself because it could be dangerous. Villagers had to wait or walk more slowly when we were going to their houses because I was not as fast as them at climbing mountains! At neighbourhood parties it was obvious that I did not know how to eat the local food with my hands and to use a *tortilla* instead of using cutlery. I was a young female student who had arrived by herself, and who did not understand the language or the local customs. These aspects of my positionality put me in a less powerful position *vis-à-vis* my participants. Therefore, I was a middle-class, educated woman, but I also needed help in gaining access to my participants, in participating in the everyday activities of the towns, and in becoming accepted.

### 3.5 Ethics

The ethical considerations of this research are based on the ‘University of Sussex Code of Practice for Research’ (2014) and the five principles of the ‘Framework for Research Ethics’ of the Economic and Social Research Council (ESRC 2015).

I informed my participants about the topic of my research and about their role as subjects of my study, thus enabling them to decide whether they wanted to participate or not. I tried to provide information on my research in a simple and understandable way, making sure that participants understood, had time to think, and had the chance about whether to take part or not. Consent was requested verbally because I did not want my participants to feel uncomfortable or suspect about the purpose of the research – not the least because some of them did not know how to write or read.

The group of participants whom I considered to deserve particular attention on ethical issues was young participants in the focus groups (between 14 and 18 years old). All participants of the focus groups were informed about the research and invited to take part voluntarily. With this aim in mind, I showed the content of the sessions to the school authorities and asked for their consent before approaching potential participants. All focus-group sessions were conducted at school with the consent of the authorities. I employed specific ethical tactics based on other studies conducted with young people (e.g. Bagnoli and Clark, 2010; Murray, 2006; Swartz, 2011).

As experienced by other researchers from developing countries who had returned home to carry out some research (Crossa, 2012; Lal, 1996; Siwale, 2015), there were moments when I experienced ethical issues. For example, when I attended the meetings with the mothers at the initial stage of my fieldwork I experienced one of the most uncomfortable moments of my research. This happened when the facilitator of a workshop emphasised the ‘greetings’ from the President and handed leaflets to the mothers about the benefits of the economic reforms that the government was promoting at that time. The facilitator asked me to take pictures of him giving the leaflet to one of the mothers, asking her to smile for the camera. He then handed a bunch of leaflets to the other mothers so they could give them to other beneficiaries and members of the town. As a researcher in my own home country doing research on programmes that target the poor, what was I supposed to do when their participants were manipulated or were being taken advantage of? I had to keep my views to myself.

Additionally, inequalities in access to education became another ethical issue. As a *mestiza*, my experiences at school and my privileged study in private institutions were different to those of my participants. The latter had received a different quality of education, or had not been able to access higher levels of education because of the economic, class and ethnic barriers that characterise the education system in Mexico,

which reinforces and reproduces the privilege of some at the expense of the exclusion of others. Finally, I also faced ethical issues related to migration status and how migrants are treated – not only in the USA but also within Mexico – according to their class and ethnicity. In the USA I was privileged to have a visa and be able to enter and leave the country whenever I needed to. On the other hand, my participants had to cross the border as ‘illegals’, a wall that already exists and that many Mexicans and Latin Americans have paid for with their lives. Within Mexico, my participants enjoyed freedom of movement; nevertheless, people from Tama and Tlahui – while migrating internally – were crossing linguistic, cultural and social boundaries. I felt disturbed and powerless when they narrated how they were called ‘*Indios*’ in the city, or how people made jokes about the way they spoke or dressed. I hope my thesis will raise concerns about these issues and that it will have the potential to promote social justice in Mexico.

### 3.6 Summary

In this chapter I have explained the methodology used in this thesis, my positionality as a researcher and the ethical issues I faced while conducting fieldwork. I accompanied the use of mixed methods with a triangulation strategy. Qualitative methods were mostly employed, but I also made use of quantitative data. I first conducted 13 focus groups with beneficiaries and non-beneficiaries of *Oportunidades* in the transition from junior-high to senior-high school and from senior-high school to university in the towns of Tama and Tlahui, and the hamlets of Lindavista and Tejas. I also administered a questionnaire to the participants of the focus groups and to other students in this peer group in order to collect data about their backgrounds and aspirations, and to obtain an overall picture of the migration flows and educational context of each locality. Afterwards, I carried out 119 interviews as well as participant observation in the four localities, as well as in Oaxaca City, Mexico City and Los Angeles, California. I then reflected on my positionality.

The identity of the researcher within the research context is neither fixed nor predetermined (Lal, 1996). Positionality also implies reflection on how the researcher is located in structures of power relations and their influence, on the methods used and on interpretations and knowledge production (Sultana, 2007). I showed how my experience of returning to Mexico to do fieldwork was challenging in terms of reflecting on my positionality and how this could affect the research process, data collection and ethical considerations. Returning to Mexico was not entirely returning home as my field sites

were rural (unlike Mexico City, where I was born and grew up) and I did not speak the language, nor did I share the same culture and world view as my participants.

Moreover, my identity as an ‘insider’ was deeply divided by class privilege (Lal, 1996; Sultana, 2007). As a middle-class Mexican pursuing studies abroad, I was aware of my class, educational privilege and advantage in power relations. However, I was able to create ‘commonalities’ (Sultana, 2007) with my participants through multiple identities – such as being a woman, being a student, being Mexican and being a foreigner. This positionality also allowed me to experience power relations working both ways. I have argued that honesty about the identity of the researcher and the aims of the research, and mutual respect, are not only essential, in terms of ethics, but facilitate relationships of trust and understanding when facing the challenges of applying formal ethical frameworks in developing countries.



# 4

## Context

In this chapter I provide the contextual background to the locations in my study, presenting the migration context of Mexico and Oaxaca then the particular context of the research sites themselves, before showing that internal migration is higher in Mexico overall, and that this number doubles when we take into account intra-state migration. The types of migration are shaped by each town's specific history and consequent social networks.

I include official data to describe the demographics, migration, poverty and educational situation of the two municipalities. I include data from my own quantitative questionnaire to complement the migration data. I also include qualitative data, from both other studies and my own interviews, in order to further analyse the differences between the localities. In this section I focus my attention on Tama and Tlahui – where most of my fieldwork took place – thus providing a broader background for the evidence I present in my empirical chapters. Where they are available, I present data on the two hamlets of Lindavista and Tejas in the quantitative overview. Table 4.1 summarises the main characteristics and differences between Tama and Tlahui.

### 4.1 Mexican migration

Scholarship on Mexican migration has mostly focused on international movements to the USA (e.g. Massey *et al.*, 1994a; McKenzie and Rapoport, 2010). The large-scale internal migration accompanying these movements has received less attention. This section first explores the international aspect, then focuses on recent internal migration trends.

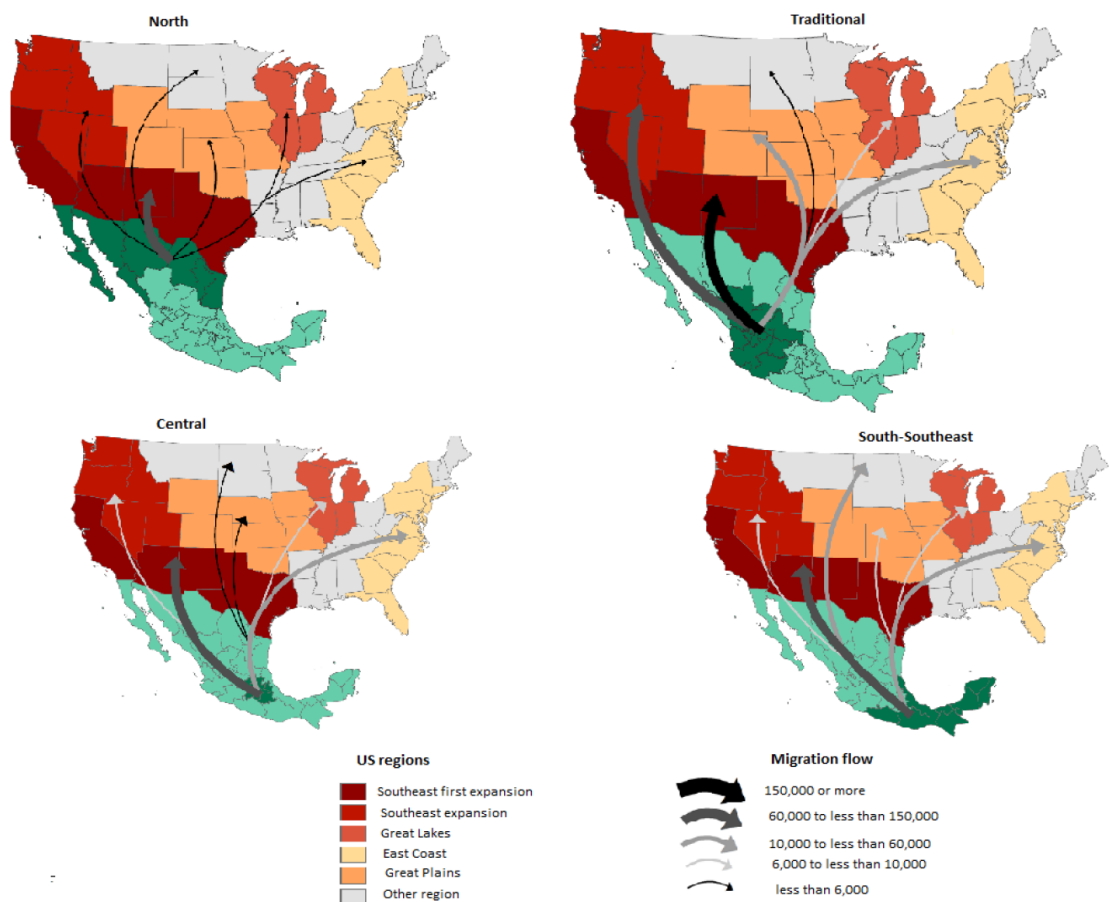
**Table 4.1 Comparison between Tama and Tlahui**

	<b>Tama</b>	<b>Tlahui</b>
Population	Municipality: 7,362      Town: 2,783	Municipality: 9,663      Town: 3,452
Economic activities	Agriculture, cattle-breeding, crafts, small businesses/trading	Agriculture, crafts, woodcutting industry, small businesses/trading
Agricultural characteristics	<ul style="list-style-type: none"> <li>• Main crops: corn, beans, potatoes, peaches, <i>chilacayote</i> (type of gourd), avocados, green tomatoes</li> <li>• Cropping pattern: grown during rainy season (May–Aug); cropped end of year (end Sept–Dec)</li> <li>• Crops rainfed and mostly for subsistence</li> </ul>	<ul style="list-style-type: none"> <li>• Main crops: corn, beans, potatoes, peaches and agave</li> <li>• Cropping pattern: grown during rainy season (May–Aug); cropped end of year (end Sept–Dec)</li> <li>• Crops rainfed and mostly for subsistence</li> </ul>
Agricultural productivity	Yield rates (tons/ha): beans = 0.39; corn = 1.04	Yield rates (tons/ha): beans = 0.43; corn = 1.09
Migration flows	<ul style="list-style-type: none"> <li>• International: USA (Los Angeles, Sacramento, Milwaukee, Washington). High level of migration intensity</li> <li>• Seasonal: Caborca, Sonora (agricultural sector)</li> <li>• Internal: Veracruz, Aguascalientes, Mexico City, Guanajuto, State of Mexico, Queretaro, Sonora, San Luis Potosi</li> </ul>	<ul style="list-style-type: none"> <li>• International: Los Angeles, other USA destinations. Low-level of migration intensity</li> <li>• Seasonal: other municipalities within Oaxaca state (construction sector)</li> <li>• Internal: Mexico City, State of Mexico, Puebla</li> </ul>
% Households with international migration in 2010	6.58	3.05
Funds received by 3x1 programme (funded by international migrants and federal and state governments (Mexican <i>pesos</i> ))	22,340,657	0
Migration tradition	<ul style="list-style-type: none"> <li>• Labour migration to the <i>taquerias</i> (taco businesses) agriculture and construction sectors</li> <li>• Educational migration of those studying for technical careers or university</li> </ul>	<ul style="list-style-type: none"> <li>• More emphasis on educational migration</li> <li>• More emphasis on labour migration in service, agricultural and construction sectors</li> </ul>
% population living in poverty (municipal level)	82.3	81.9
	Households covered by Oportunidades: 1,242	Households covered by Oportunidades: 1,557
% pop. living in extreme poverty (municipal level)	43.7	48.2
% lacking access to health services	32.2	65.1
% lacking access to basic housing services	81.6	95.6
% lacking access to food basket	45.8	50.0
Resources received from federal/state governments (Mexican <i>pesos</i> )	17,672,652	31,208,391
Educational gap: % people with less than government-mandated education for age group	40.1	30.5
Education history	<ul style="list-style-type: none"> <li>• No development of local education projects</li> <li>• All schools government-run, following state curriculum and taught in Spanish</li> </ul>	<ul style="list-style-type: none"> <li>• Education promoted by Salesian Order since 1960s, including migration to continue study</li> <li>• First professionals returned to Tlahui and became agents of change promoting local educational projects and <i>Mixe</i> identity</li> </ul>
Levels of schooling and educational characteristics	<ul style="list-style-type: none"> <li>• All levels up to senior high (18 years of age)</li> <li>• Primary, junior and senior high schools administered by federal state and taught in Spanish</li> </ul>	<ul style="list-style-type: none"> <li>• All levels, from basic education to two higher-education institutions and one school of music</li> <li>• Primary and junior high schools administered by federal state and taught in Spanish</li> <li>• Senior high school combines national and local curricula</li> </ul>
Effects of migration on <i>cargo</i> system	<ul style="list-style-type: none"> <li>• Able to send remittances (international and internal) and donate gifts to avoid <i>cargo</i> and reaffirm belonging to and membership of town</li> <li>• Able to pay substitute to undertake <i>cargo</i> in their stead</li> </ul>	<ul style="list-style-type: none"> <li>• No allowances or prizes for remittances sent or to pay a substitute</li> <li>• <i>Cargo</i> not affected by migration flows</li> <li>• Citizens not undertaking <i>cargo</i> may be expelled</li> </ul>

#### 4.1.1 Mexican international migration

In 2013, an estimated 13.2 million Mexicans were living in the USA, representing 10.7 per cent of the Mexican population (World Bank, 2016a). Globally, in 2015, Mexico was fourth among the main remittance-receiving countries, with an estimated total of 25.7 billion dollars received (World Bank, 2016a). Around half (51 per cent) of all current Mexican immigrants are unauthorised, and some 58 per cent of all unauthorised immigrants in the US are Mexican (Passel and Cohn, 2011). Mexican migration to the USA has been affected by economic factors and social, demographic and political processes affecting both countries. Today, almost the entire country shows some form of linkage with international migration (CONAPO, 2010a). The flows that began in the west-central states of Mexico and were classified as ‘traditional’ migration (Chihuahua, Durango, Zacatecas, Jalisco, Michoacán and Guanajuato) expanded to new circuits and into most of the USA, as Figure 4.1 illustrates.

**Figure 4.1 Principal Mexico–US migratory flows 2010–2012**

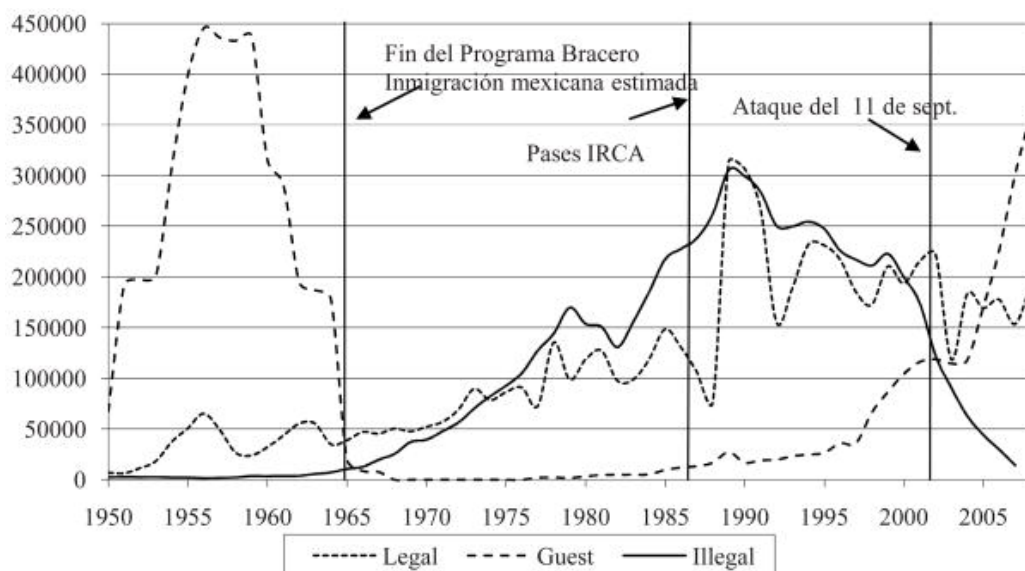


Source: CONAPO (2012).

Although Mexicans have been migrating to the USA since the early-nineteenth century, the policy that transformed Mexico into a country of emigrants began with the US ‘*Bracero*’ programme, whereby guest agricultural workers were contracted to resolve existent labour shortages exacerbated during World War Two. This policy lasted from 1942 to 1964 and involved more than 4.6 million contracts (Snodgrass, 2011), with those states which became part of the ‘traditional region of migration’ benefiting the most. Snodgrass (2011) has suggested that this regional focus had a political explanation: the ruling party, the Party of the Institutionalized Revolution (PRI), gave preference to its allied states in order to strengthen its political machine. Non-allied states like Oaxaca, Guerrero or Morelos were allotted very few *Bracero* contracts. For those that did receive them, the programme created substantial social networks that facilitated later migration (Massey *et al.*, 2002).

The unilateral cancellation of the *Bracero* programme led to an increase in undocumented Mexican migration from 1965. The demand for agricultural and low-skilled workers in the USA continued but, due to tougher migration policies after 1965, these flows became undocumented (O. Martinez, 2011; Massey *et al.*, 2002), as shown in Figure 4.2, which includes the flows of three types of migration from Mexico to the USA: legal, illegal and guest workers from 1950 to the mid-2000s.

**Figure 4.2 Mexican migration to the USA (1950–2000s)**



Source: Massey *et al.* (2009).

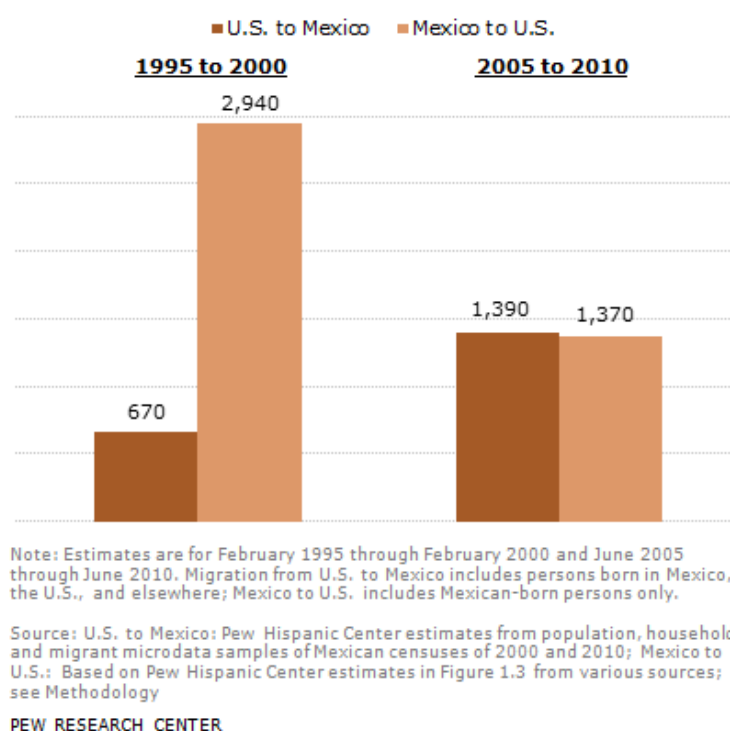
The collapse of the Mexican economy in 1982 increased migration both internally and internationally, including in states like Oaxaca, Guerrero, Puebla and Morelos (Cohen, 2001). Increased undocumented migration and the White House's cold-war anxieties linking border control to national security increased political pressure in the USA, resulting in the Immigration Reform and Control Act – or IRCA – of 1986 (Massey *et al.*, 2002). The IRCA increased border enforcement, imposed sanctions against employers hiring undocumented migrants and legalised around 2.3 million formerly undocumented migrants (Massey *et al.*, 2002).

However, the disparities between the Mexican and the US labour markets, the increased unemployment induced by free-market strategies such as NAFTA, growing inequalities in the agricultural sector and the collapse of the Mexican *peso* and consequent economic crisis of 1994 all increased the pressure on Mexicans to migrate (Zamora, 2014). Likewise, after 1990, the number of legal immigrants continued to rise, due to the increased number of Mexicans looking for protection from the enforced laws against resident aliens who were eligible to acquire citizenship (Massey, 2011). Each new citizen had the right to bring in unlimited close relatives. This, along with an increase in temporary agricultural workers, explains the main growth of international Mexican migration in the 1990s and 2000s (Figure 4.2).

After 1998, the increasing militarisation of the border led to a sharp decrease in undocumented entries due to higher costs and risks. The 2008 financial crisis reduced the flows of Mexican migrants to the USA even further (Zamora, 2014), as shown in Figure 4.3.

These factors have contributed to a new and uncertain phase in Mexican migration, with divided opinions as to what will happen in the future. Massey (2011) suggested that Mexican immigrants to the US showed no intention of returning to Mexico but, nevertheless, predicted a decline in remittances due to lower wages, and Massey *et al.* (2014) a drop in undocumented migration mainly due to reduced fertility rates. In contrast, Passel *et al.* (2012) raised the possibility that migration might continue as the USA economy recovers. Elsewhere, Zamora (2014) has predicted a new pattern of permanent migration involving the entire family, increasing short- and medium-term undocumented migration driven by family reunification.

**Figure 4.3. Migration flows between the US and Mexico, 1995–2000 and 2005–2010  
(in thousands)**



Source: Passel *et al.* (2012).

Nevertheless, a more recent Pew Research Centre study (2015), based on government data from both countries, found that the number of new arrivals in the USA declined considerably – from 1.4 million between 2005 and 2010, to 870,000 between 2009 and 2014. Likewise, from 2009 to 2014, 1 million Mexicans and their families returned to Mexico. Therefore, these data show that, in the period under study, more Mexicans returned from the USA than migrated to it. The same study suggests that this trend is due to the slow recovery of the US job market after the recession and to the stricter enforcement of US immigration laws, although the main reason for returning, according to Mexicans, was family reunification. Yet, while international migration has, to some extent, reduced, internal migration has continued to rise, as I show in the next section.

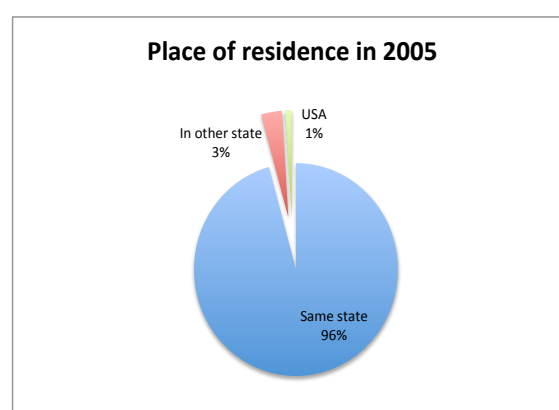
#### *4.1.2 The role of internal migration in recent trends*

The official data below draw on the latest (2010) population census by the National Institute of Statistics and Geography (INEGI) and on data from the National Council of Population (CONAPO) – also based on the INEGI census. They show that internal migration is a significant component of Mexican migration.

In its ‘basic survey’, conducted in 2000, 2005 and 2010, INEGI measured the place of residence (in the five previous years) of people over the age of five throughout the country. This provides a rough estimate of migration destinations between 1995 and 2005, as shown in Figure 4.4; from 2005 to 2010, there was more migration internally (3,292,310) than to the USA (994, 474).

**Figure 4.4. Mexican population aged 5+, 2000–2005–2010 and place of residence five years earlier**

Year of survey		2000	2005	2010
Total population over 5		84, 794, 454	90, 266, 425	100,410,810
Place of residence 5 years ago	Same state	80, 565, 026	87, 087, 188	95,431,977
	In other state	3,584,957	2, 410, 407	3,292,310
	USA	343, 790	244, 244	994,474



*Source:* own elaboration of data from INEGI (2010).

However, the movements reported by INEGI only represent people moving across state and national boundaries. CONAPO (2014) estimated the number of movements across municipalities within the same state during the same period (see Table 4.2).

**Table 4.2 Internal migration: state and municipality level**

Year of survey		2000	2010
Place of residence in last five years	Other state	3.6	3.3
	Other municipality	2.3	3.1
Total internal migrants (in millions)		5.9	6.4

*Source:* CONAPO (2014).

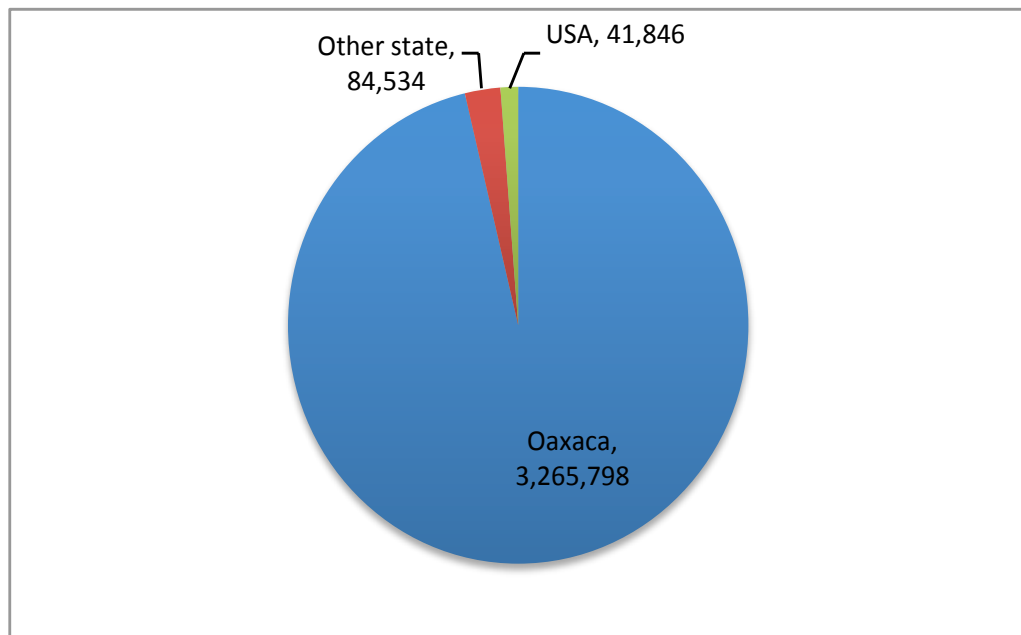
While no data regarding more-recent migration between 2010 and 2015 exist, there are, nonetheless, two important points to highlight. First, the 2000–2010 data show that internal migration movements are higher than those reported by INEGI, if one includes people moving within their own state. Second, a significant proportion of migration was at the municipal level and increased over this period, in contrast to state and

international migration, explicable by the fact that economic uncertainty in Mexico and reduced opportunities in the USA due to the 2008 crisis meant that individuals might have preferred to migrate closer to home. Another explanation might be the growing number of new metropolitan areas, from 37 in 1990 to 56 in 2010 (Perez and Santos, 2013). These cities and surrounding urban localities may be attracting people from within their states to where more infrastructure, jobs and services are available.

#### *4.1.3 Migration from Oaxaca*

In 2010 the Oaxacan population over five years old was 3,405,990 inhabitants (INEGI, 2010). Figure 4.5 shows that the vast majority were living in Oaxaca in 2005, with just 2.5 per cent living in other states in Mexico or the USA (1.2 per cent). Those living in other states had largely lived in Mexico City, the state of Mexico, and the neighbouring states of Veracruz, Puebla and Chiapas. These data suggest that internal migration was twice as high as international migration.

**Figure 4.5 Population in Oaxaca aged 5+ in 2010 and place of residence in 2005**



*Source:* own elaboration of data from INEGI (2010).

The two most-studied groups in the context of international migration are the Zapotecs and the Mixtecs, due to their earlier participation in international migration under the



*Bracero* programme (Cohen, 2001; Fox, 2011). While Oaxacans migrated as agricultural workers to Chiapas or the northern states of Mexico in the 1950s and 1960s, migration increased to Mexico City during the 1960s and 1970s as economic growth made its labour market more attractive (Cohen and Rios, 2016; Fox, 2011). This migration intensified during the 1980s and 1990s. While some migrants used internal migration as a first step to the USA, others settled in urban areas, including Mexico and Oaxaca City, in tourist destinations or as agricultural workers in the northern states (Cohen and Rios, 2016).

Studies of Oaxacan migration have explored the impact of remittances on migrant areas of origin (e.g. Adida and Girod, 2011; Cohen, 2010; Cohen and Rodriguez, 2005) and how migrants continue to participate in their traditional governance systems – known as *usos y costumbres* (uses and customs) – at home. The organisation of the political, social and civil life of these localities is based on the community assembly, religious parties, the *tequio* (communal works), communal land tenure and the *cargo* system (Vasquez and Gomez, 2006). Cancian (1965: 1) defines the *cargo* as:

religious offices occupied on a rotating basis by the men<sup>14</sup> of the community... The office holders serve for a year and then return to their roles in everyday life, leaving the office to another man. The incumbents receive no pay for their years of service. Rather they spend substantial amounts of money sponsoring religious celebrations for the saints of the Catholic Church.

Holding a *cargo* according to community expectations gives people the right to live, own land and be part of the town (J. Martinez, 2011; Nahmad, 2003). They are arranged in a hierarchy and ‘the degree and manner of a man’s participation in this hierarchy is the major factor in determining his place in the community...’ (Cancian, 1965: 2). The *cargo* has an influence on status and, therefore, a huge social significance.

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<sup>14</sup> Cancian does not specify why only men participate in the *cargo* system; however, he states that the *cargo* reflects the economic capacity of the person and is a system in which ‘money is exchanged for personal prestige’ (1965: 4). A woman hardly had the economic means to finance the *cargo* in the patriarchal society that he described, and men were considered the head of households. However, women in Tama and Tlahui have now begun to participate in the *cargos*, though none has ever held the Municipal Presidency and they have experienced situations of discrimination or less recognition of their duties when elected, as described by Gallardo (2013). Women also have greater responsibilities when their husbands hold a high-ranked *cargo* but they are still considered to have a subordinate role in the family and the social hierarchy (J. Martinez, 2011). However, during my fieldwork in Tama in 2014, a woman was elected Auxiliary Municipal President. In 2018, a woman was elected as Municipal president for the first time, which is great social recognition and a positive step towards the place of women in the system.

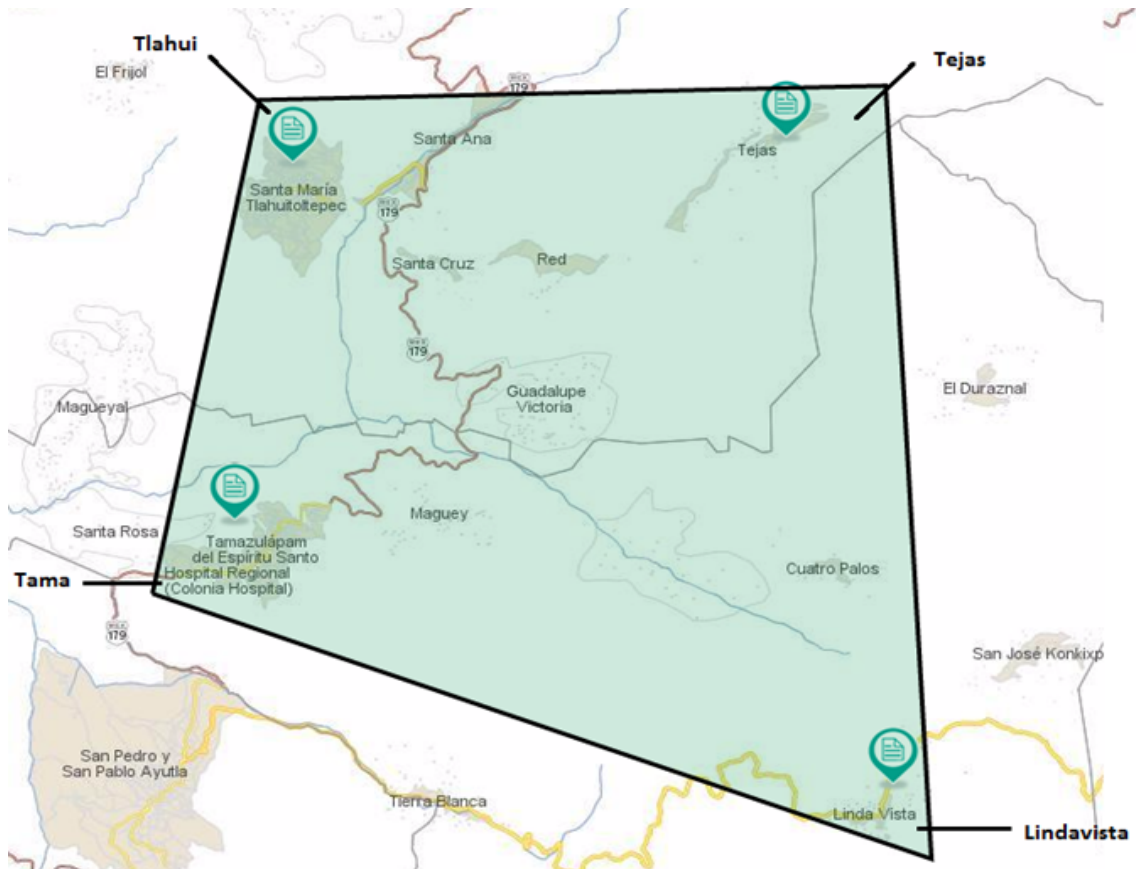
The *cargo* has been described as ‘the heart of politics in rural Oaxaca’ (Cohen, 2004: 14). How migration and the flow of remittances have modified or adapted the *usos y costumbres* system, mainly through the *cargo*, has been the subject of ongoing debate. Robson and Wiest (2014) found that the system was negatively impacted, due to a lack of men, increasing the workload for those who stayed. As a result, migrants were required to pay substitutes at home to fulfil their duties, but some began to question their participation or no longer participated. In contrast, Van Wey *et al.*, (2005) found that localities in Oaxaca were using the *cargo* system to their advantage by requiring international migrants to pay for *tequios*, donations for the parties and town projects that they could not fulfil themselves. Similarly, Cohen (2001) found that remittances covered the costs of the duties of a *cargo*. Therefore, these studies suggest that remittances helped migrants to confirm their ties and identity with their localities, and enabled their localities to access high levels of remittances. Nevertheless, most of this literature studied the contributions from international rather than internal migrants. In this thesis, I look at both internal and international remittances at the local and the household level.

#### **4.2 Research sites: quantitative overview**

As the preceding discussion has shown, the structure that influences the shaping of aspirations and the decision to migrate or to stay do not take place in a socio-economic and cultural vacuum. They are developed and should be approached in the context of the specific social, economic and political structures of the localities (de Haas, 2011), such as people’s obligations under the *cargo* system. To do this, I now examine the context of Tama, Tlahui, Lindavista and Tejas (see Figure 4.6 for a simple map of the *Mixe* region).

As mentioned, Tama and Tlahui are the principle towns of their respective municipalities. As such, they offer more services and amenities such as health centres, high schools and post offices than the surrounding hamlets. Likewise, Tama and Tlahui are administrative centres in which are concentrated the political and the symbolic power of the entire municipality.

**Figure 4.6 Location of Tama, Tlahui, Lindavista and Tejas**



#### *4.2.1 Population and household census*

**Tama** has a population of 2,783 inhabitants belonging to 650 households (on average made up of 4.18 members each) and is located 2,040 metres above sea level. Economic activities include agriculture, cattle-breeding and craft-making. The cold weather, the lack of an irrigation system, and the bad quality of the water affect agricultural activities. The mountainous terrain is too steep, resulting in a soil that is badly eroded, causing lower agricultural productivity than the district level (see Table 4.3). As a result, although the population continues to grow corn, beans, potatoes, peaches, *chilacayote* (type of gourd) and green tomatoes, these are mainly for subsistence, since the yields are too low for commercial farming.

**Table 4.3 Agricultural production of three main crops in Tamazulapam municipality (2015)**

Product	Cropped surface (Ha)	Annual yield (Tons)	Municipal yield rate (Tons/Ha)	District yield rate (Tons/Ha)	National yield rate (Tons/Ha)
Beans	171.00	66.84	0.39	0.41	0.62
Corn	921.00	957.84	1.04	1.14	3.48
Potatoes	13.50	125.68	9.31	9.27	27.14

*Source:* own elaboration of data from SIAP (2015).

The commercial and service sectors are the main economic activities, visible on arrival in the town, with its large number of small businesses – including corner shops, arts and crafts stalls, small restaurants and food stalls, clothes and shoe shops – and other services such as garages, Internet cafés, stationery shops, pharmacies and even a clinical laboratory. Official data from the Ministry of Education (SEP, 2017) show that these activities represent 66 per cent of total employment.

**Lindavista** has a population of 587 inhabitants in 136 households (on average 4.32 members each). Located 2,255 metres above sea level, its main economic activity is agriculture, with corn and beans the main products. The weather and the soil conditions are similar to those in Tama. Other economic activities include cattle-breeding, making crafts and a few small businesses, but of less importance than in Tama.

**Tlahui** has a population of 3,452 inhabitants in 732 households (on average 4.72 members each). Located 2,400 metres above sea level, its main activities are agriculture, wood-cutting, and the service and commercial sectors. Corn, beans, potatoes, peaches and agave (plant from which *mescal* is made) are the main crops. As in Tama, the inhabitants cultivate their products on the outskirts or in neighbouring hamlets, but the same weather conditions contribute to low productivity (see Table 4.4). However, Tlahui shows slightly higher yield rates compared with Tama and the district rate (in the case of beans and potatoes) because, firstly, agriculture is the livelihood of a larger proportion of the population.

**Table 4.4 Agricultural production of three main crops in Tlahuitoltepec municipality (2015)**

Product	Cropped surface (Ha)	Annual yield (Tons)	Municipal yield rate (Tons/Ha)	District yield rate (Tons/Ha)	National yield rate (Tons/Ha)
Beans	216.00	92.88	0.43	0.41	0.62
Corn	1,025.00	1,117.25	1.09	1.14	3.48
Potatoes	20.0	189.00	9.45	9.27	27.14

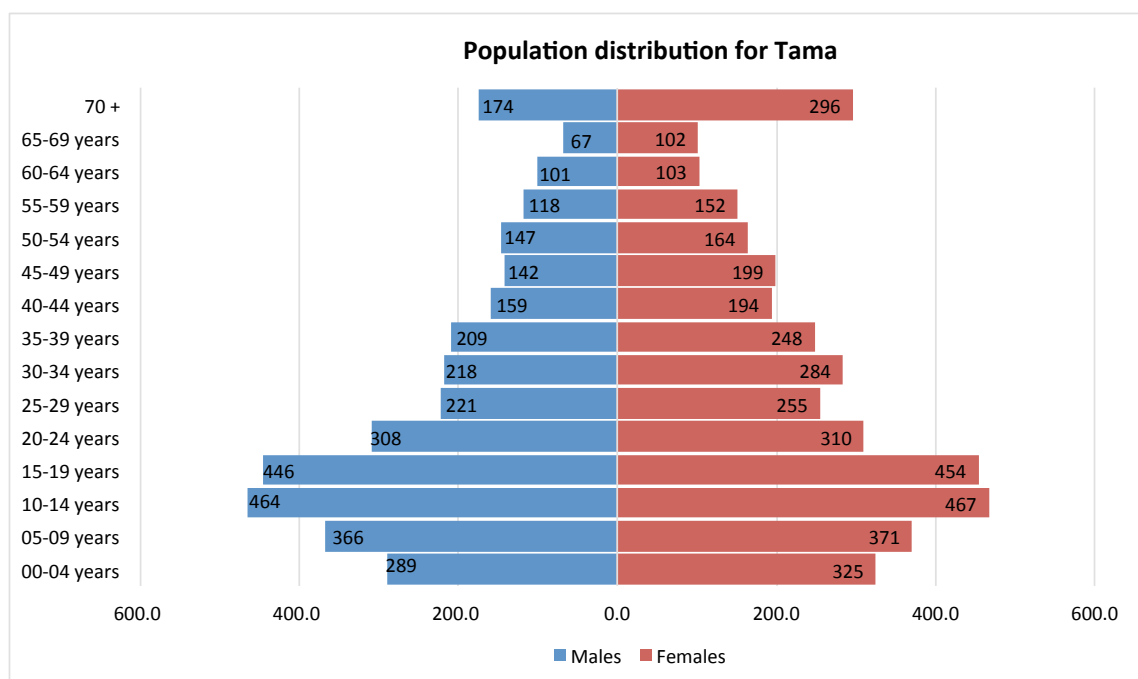
*Source:* own elaboration of data from SIAP (2015).

According to SEP (2017), the commercial and the service sectors employ 53 per cent of the population (compared with 66 per cent in Tama). This is also visible on arrival in Tlahui, where there is less commercial activity, fewer small businesses and more women selling their agricultural surplus than in Tama. Secondly, the local authorities have been able to access more economic resources in support of agriculture through its Council of Municipal Development, an established branch of the municipality. I elaborate on this council and the access to government funds later in this chapter.

Finally, **Tejas** has 417 inhabitants in 93 households (4.48 members each on average). Located 2,345 meters above sea level, its main economic activity is agriculture, with corn the main crop and similar weather conditions affecting agricultural productivity.

Figures 4.7 and 4.8 show the population of Tama and Tlahui municipalities who are over five years old, and include their age/sex structure. Clearly, the four localities have young populations – and the number of births is reducing – but they show quite different trends. In Tama, the proportions of females and males are fairly equal until their mid-20s, when the male population begins to decline. The differences are much greater in the 35–39-year and 45–49-year age ranges, possibly because males may have migrated more than females from their mid-20s until the age of 60. The male population begins to decrease again from 65 years onwards because women live longer than men.

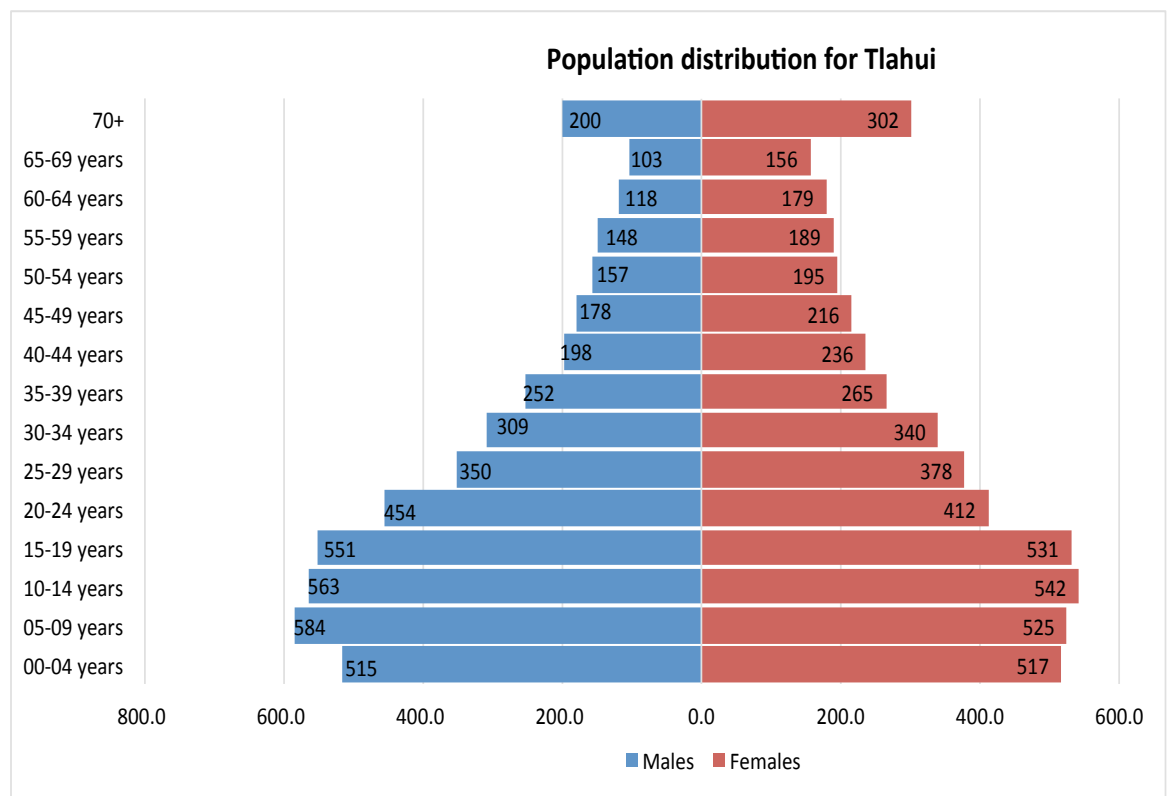
**Figure 4.7 Population pyramid of Tama (2010)**



*Source:* own elaboration of data from INEGI (2010).

Interestingly, in Tlahui the proportion of females is lower than males (those aged 0–4 are the exception) until they are 20–25+ years, suggesting that males start to migrate from their mid-20s onwards while females remain in Tlahui. It may also be that, from an early age, females migrate more than men and return home in their mid-20s to start their own family; this then coincides with a decrease in the male population.

**Figure 4.8 Population pyramid of Tlahui (2010)**



*Source:* own elaboration of data from INEGI (2010).

The Main Results by Locality (ITER) data from 1990, 1995, 2000, 2005 and 2010 allow me to analyse and compare them over time. However, the collection and presentation of survey data by INEGI differed over the five time periods. Appendix 3 presents demographic data, where available, for the four localities, divided into age categories, as in the different censuses. In spite of this flaw, the data provide an insight into population changes in each locality at that period (see Table 4.5).

**Table 4.5 Demographic profiles of Tama, Lindavista, Tlahui and Tejas (1990–2010)**

	<b>Year</b>	<b>Total population</b>	<b>Total male population</b>	<b>Total female population</b>
Tama	1990	1,747	865	919
	1995	2,031	987	1,044
	2000	2,253	1,052	1,201
	2005	2,372	1,101	1,721
	2010	2,783	1,280	1,503
Lindavista	1990	914	439	475
	1995	628	300	328
	2000	855	405	450
	2005	670	296	374
	2010	587	275	312
Tlahui	1990	2,187	1,107	1,080
	1995	2,407	1,185	1,222
	2000	2,735	1,320	1,415
	2005	3,246	1,594	1,652
	2010	3,452	1,641	1,811
Tejas	1990	593	294	299
	1995	460	232	228
	2000	534	260	274
	2005	464	222	242
	2010	417	188	229

*Source:* own elaboration of data from ITER (1990, 1995, 2000, 2005, 2010).

My first observation is that, from 1990 to 2010, the population in Tama and Tlahui increased while decreasing in Lindavista and Tejas. Population growth in Mexico, according to Sobrino (2007), can be related to fertility rates or to migration movements. Looking at fertility rates, in 1980 women in Oaxaca State in the 40–49-year age group had an average of five children (INEGI, 1980). The fertility rate reduced from 4.42 children in 1990 to 2.65 in 2010 (ITER, 1990, 2010). In Tama and Tlahui, it reduced to 2.63 children and 2.52 respectively (ITER, 2010). However, although fertility rates in Tama and Tlahui have reduced, an increase of population could still be natural due to a previous surge in demographic growth (Keyfitz, 1971). An increase in the population can also be related to migration – perhaps through an inflow of rural individuals and their families, attracted by more job opportunities and services. This thesis is supported by earlier data showing an increase, over the last decade, of intra-state migration in Mexico. Another explanation is the higher numbers of return migrants, including those from the hamlets, who settled in Tama and Tlahui. Therefore, the increase in the population can be due to immigration but this is not necessarily the main reason for the

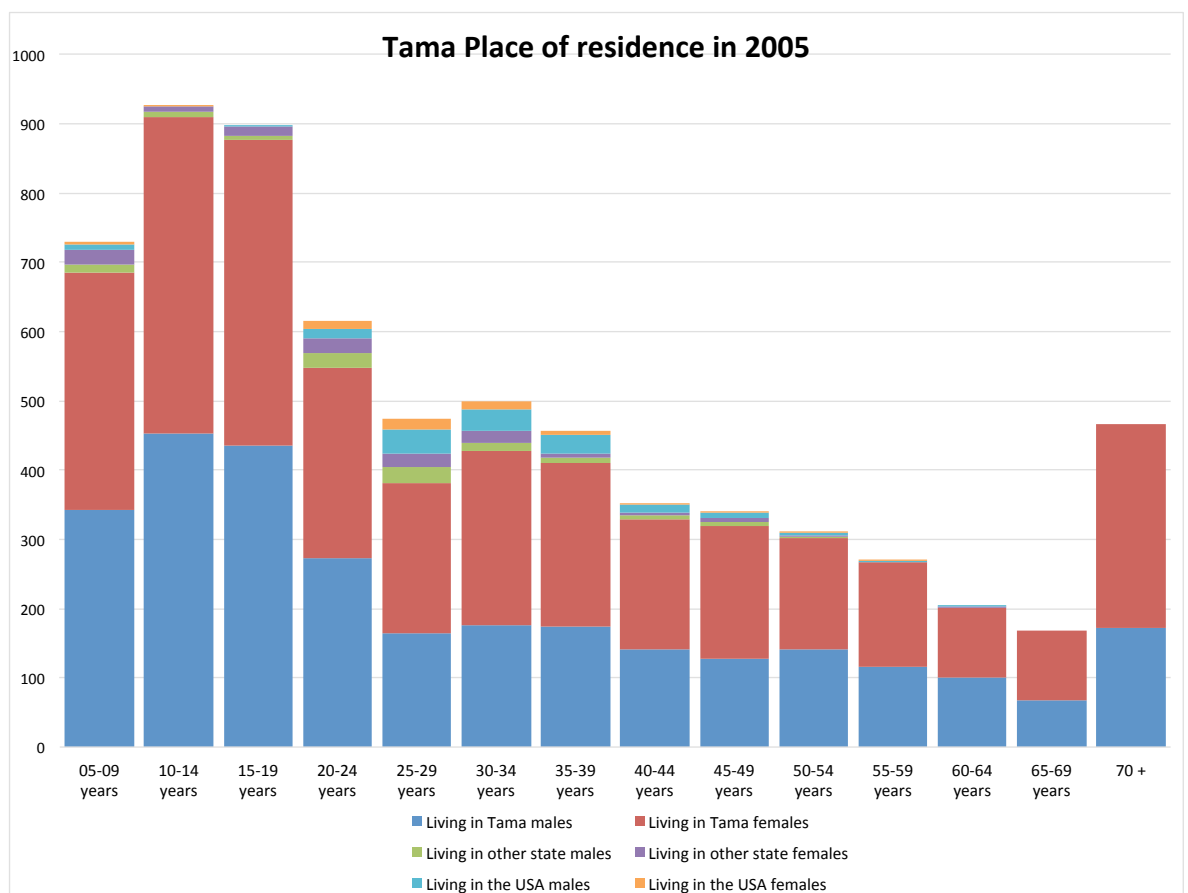
growth, as it may also be part of a natural increase due to a previous ‘population momentum’ (Keyfitz, 1971).

The reduction of the population in Lindavista and Tejas was significant – down by 36 and 30 per cent respectively between 1995 and 2010, possibly due to lower fertility rates – 3.19 in Lindavista and 3.06 in Tejas (ITER, 2010) or higher migration to Tama and Tlahui. Another reason is the internal and international migration in the 2000s that caused the depopulation of localities in Oaxaca and other parts of Mexico – at least 600 Mexican municipalities were facing depopulation between 2000 and 2006 due to both decreased birth rates and increased migration to the USA (Zamora, 2014). To continue examining the demographics, I now analyse the available migration data.

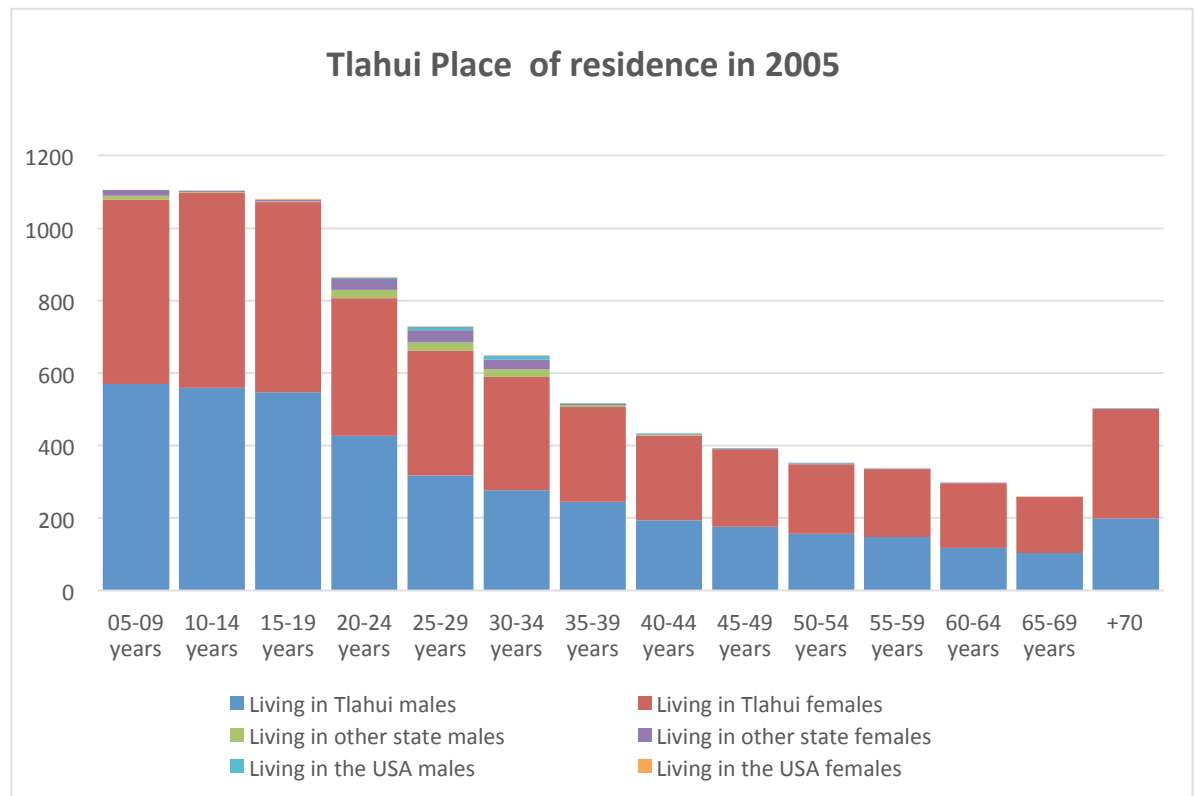
#### 4.2.2 Migration

INEGI’s (2010) ‘expanded questionnaire’ measures migration at the municipal level by surveying the place of residence in 2005 of those (aged 5+) who were living in Tama and Tlahui by 2010 (see Figure 4.9).

**Figure 4.9 Place of residence in 2005 of residents of Tama and Tlahui in 2010**







*Source:* Own elaboration of data from ITER (2010).

The data in **Tama** at the municipal level show that, out of its 6,739 inhabitants in 2010, 6,293 were already living there in 2005 – an increase of 446 inhabitants. Of these, 223 returned from other states within Mexico, 198 were living in the USA, 1 in another country and 24 unknown. Although the data represent return stocks, they provide a broad picture of where people migrated to. Those who returned from internal destinations had migrated to 16 of Mexico's 32 states (mostly to Mexico City, Guanajuato, State of Mexico, Queretaro, Sonora and San Luis Potosi) all states are where *taquerias* are based. The *taquerias* are a type of fast-food restaurant or stall specialising in a Mexican dish known as *tacos*,<sup>15</sup> where, as I will show, many Tama migrants worked.

The data in **Tlahui** reveal that, from its 8,631 inhabitants in 2010, 8,367 were already living in Tlahui in 2005 – an increase of 264, of whom 221 returned from other states within Mexico, 34 were living in the USA, 1 in another country and 8 unknown. Those who returned from internal destinations had travelled to 16 states, mostly to Mexico

<sup>15</sup> A *taco* is a traditional Mexican dish made of corn tortilla (a type of thin, unleavened flatbread) folded or rolled around a filling such as beef, pork, chicken, seafood or vegetables. Eaten without cutlery, it is often accompanied by garnishes such as salsa, lemon, pineapple, coriander and onions.

City and the State of Mexico. The data from both municipalities, by age and gender, are shown in Appendix 4, and by number of returns per state in Appendix 5.

These numbers only show movements from the USA or from other states to Tama and Tlahui, ignoring movements across municipalities, including within the same state. These data are provided by CONAPO (2010b), from its ‘inter-municipal matrix’ based on INEGI. They show the people from Tama and Tlahui in 2005 who migrated to other municipalities within Oaxaca and in other states in 2010 (Table 4.6) and reveal that most people who were living in Tama in 2005 were located, in 2010, mainly in Veracruz, Aguascalientes and other municipalities in Oaxaca state. From Tlahui, most people migrated to Mexico City and other municipalities in Oaxaca state.

**Table 4.6 Migration movements of people living in Tama and Tlahui in 2005**

<b>Tama</b>		<b>Tlahui</b>	
<b>Place of residence 2010</b>	<b>Total</b>	<b>Place of residence 2010</b>	<b>Total</b>
Veracruz	87	Mexico City	258
Aguascalientes	86		
Oaxaca	83	Oaxaca	108
Puebla	33		
Irapuato	20	Puebla	3
State of Mexico	6		
<b>Total</b>	<b>316</b>	<b>Total</b>	<b>369</b>

*Source:* own elaboration of data from CONAPO (2010b).

Overall, these numbers show more internal than international migration movements for Tlahui while, in Tama, both are important.

International migration data at the municipal level are provided by CONAPO (2000, 2010a), which estimates the ‘index of migration intensity’<sup>16</sup> – i.e. the absence or presence of any migration linkage at the household level on the base of four indicators, measured since the 2000s:

- households receiving remittances;
- households with members in the USA (who migrated between 1995–2000 and between 2005–2010) who, at the census, were still abroad;

<sup>16</sup> The migration intensity index considers the household as the unit of analysis. CONAPO constructs it from the four indicators estimated as the proportion of the households with these characteristics in respect to the total number of households in the municipality. Through multivariate analysis techniques, a synthetic measure is obtained which enables this measurement and differentiates the migration intensity between states and municipalities. For example, in 2010, the index values fluctuated between –1.16443 and 5.04825. From these values, the municipalities were differentiated into very low, low, medium, high and very high.

- households with members in the USA (from 1995–2000 and 2005–2010) who returned to Mexico in the same period (circular migrants); and
- households with members in the USA in 2005 but who were living in Mexico by 2010 - return migrants. These indicators and the value of the index for Tama and Tlahui, compared with the national and Oaxaca levels, are shown in Table 4.7.

**Table 4.7 International migration indicators (2000 and 2010)**

Year	National/state/ municipal level	Households (%)				Index of migration intensity	Level of migration intensity	Place in state context	Place in national context
		Total receiving remittances	With international migration	With circular international migration	With international return migrants				
2000	National	4.47	3.95	0.97	0.87				
	Oaxaca	4.25	4.10	0.56	0.72	-0.26377	Medium		
	Tama	-	4.23	-	-	-0.69009	Very low	-	-
	Tlahui	0.31	-	0.31	-	-0.83224	Very low		
2010	National	3.63	1.94	0.92	2.19				
	Oaxaca	4.89	4.60	0.90	3.05	0.5464	High		
	Tama	2.36	6.58	2.79	6.40	0.6750	High	138	548
	Tlahui	1.77	3.05	1.39	2.41	-0.3214	Low	321	1,272

*Source:* CONAPO (2000, 2010a).

The official data show that, by 2010, international migration in Tama was higher than in Tlahui. It is important to bear in mind that the population from Tama's hamlets also contributes to these indicators due to their more difficult economic situation and their established social networks in the USA, as suggested by the demographic data on Lindavista. International migration in Tama has intensified since the 1990s. Both municipalities were classified as having 'very low' migration intensities in 2000. However, in Tama the proportion of households that engaged in international migration increased from 4.23 per cent in 2000 to 6.58 per cent in 2010. By 2010, Tama was classified as having a 'high' level of migration intensity, while Tlahui classified as 'low'. Finally, return migration increased in Tama by 2010, probably due to the 2008 economic crisis.

Higher international migration from Tama is reflected in significantly greater flows of private remittances compared to Tlahui. Table 4.8 shows the Mexican Bank's data for 2013–2016 on private international remittances (Banxico, 2016).

**Table 4.8 International remittances to Tama and Tlahui (2013–2016, in US\$)**

<b>Date</b>	<b>Tama</b>	<b>Tlahui</b>
April–June 2016	144,956	49,813
January–March 2016	113,731	30,427
October–December 2015	103,265	43,764
July–September 2015	91,198	43,142
April–June 2015	98,709	43,343
January–March 2015	90,062	26,665
October–December 2014	94,476	15,650
July–September 2014	63,859	13,640
April–June 2014	91,039	35,084
January–March 2014	185,004	131,598
October–December 2013	154,482	180,691
July–September 2013	227,778	183,658
April–June 2013	261,597	231,212
January–March 2013	177,277	159,154

*Source:* own elaboration of data from Banxico (2016).

By June 2016, the value of international remittances in Tama was almost triple that in Tlahui. However, remittances had not recovered to the level of April–June 2013. This coincides with a slowdown at the state level caused by the 2008 economic crisis, which created a lack of jobs in the USA and an increase in return migration. However, Banxico data at the municipal level do not show amounts prior to 2013 that might confirm this. Likewise, the official statistics do not record the flows through informal channels – like relatives or friends carrying cash or unregulated money transfers (World Bank, 2016a). Since the end of the 1990s, Mexican migrants have increased their access to formal channels due to better regulations and greater competition between money-transfer operators (Hernandez, 2005). However, in a survey conducted by the Inter-American Development Bank (IDB, 2007), 10 per cent of respondents still received remittances through informal channels – the official figures could therefore be higher still.

Private remittances in Tama are complemented by others from the 3x1 programme, a federal government initiative aiming to support local investments in the areas of origin. For every Mexican *peso* provided by migrants, the federal, state and municipal governments contribute an additional *peso*. According to SEDESOL (2016), there had been no 3x1 investment in Tlahui while, in Tama, investments had been occurring since 2007, due to a stronger organisation of Tama migrants in associations necessary in order to access these funds. Hence, two inflows of international remittances exist in Tama:

those submitted by individuals to their families and those through the 3x1 programme. Table 4.9 shows the total of investments in Tama.

**Table 4.9 Investments through the 3x1 programme in Tama municipality**

<b>Year</b>	<b>Community</b>	<b>Type of investment</b>	<b>Total investment in Mexican pesos</b>
2015	Lindavista	Paving the main street	2,380,000.00
2015	Magüey	Construction of basic health unit	577,776.00
2015	Tama	Paving of Piedra Larga Street	525,024.00
2015	Santa Rosa	Roofing the multipurpose court	2,480,000.00
2014	Cuatro Palos	Construction of basic health unit	1,268,000.00
2014	Tama	Paving of Santa Cruz Street (2 <sup>nd</sup> stage)	645,414.75
2013	Tama	Construction of municipal market (1 <sup>st</sup> stage)	3,766,934.00
2013	Tama	Paving of pedestrian walkway	369,484.00
2013	Tama	Paving of Agua Verde Street	758,036.00
2013	Tierra Blanca	Construction of municipal agency (2 <sup>nd</sup> stage)	2,000,000.00
2011	Tama	Construction of pedestrian walkway	1,750,725.08
2011	Tama	Construction, secondary-school retaining wall	753,252.80
2011	Tama	Roofing of elementary-school basketball court	986,010.60
2010	Tama	Paving of Rey Condo Street	1,000,000.00
2010	Tama	Construction of rainwater canal	1,580,000.00
2007	Tama	Paving, Albergue Primary/Abel Caliman Streets	1,500,000.00
		<b>Total</b>	<b>22,340,657.23</b>

*Source:* own elaboration of data from SEDESOL (2016).

My questionnaire data both confirmed and complemented the official data, in particular those on migrants' destinations and occupations, and provided more insights into the type of migration from Lindavista and Tejas. The results are shown in Table 4.10.

More heads of households migrate in Tama and Lindavista municipalities, as shown in Figure 4.7, with a higher number of males migrating in their 20s and 40s. This is because, in Tama and Lindavista, specific socio-cultural norms encourage male migration so that they can support their families, build houses and demonstrate their success while, in Tlahui and Tejas, their socio-cultural norms, mainly expressed through the *cargo*, require heads of households with family responsibilities to remain.

**Table 4.10 Results of student questionnaire: migration flows (%)**

Community	% students with relative living outside community	Relationship with migrant	Migration destination	Occupation
Tama	70	Parent	USA	Unknown
		Sibling	Mexico City	Taqueria
		Uncle	Oaxaca	Agricultural worker
		Cousin	Leon Gto	Factory worker
		Other	San Luis Potosi	Trader
			Other municipality	Student
			Guadalajara	Housemaid
			Monterey	Housewife
			Celaya	Other
			Unknown	
			Other within Mexico	
Lindavista	61	Parent	USA	Unknown
		Sibling	Mexico City	Taqueria
		Uncle	Caborca	Agricultural worker
		Cousin	Oaxaca	Factory worker
		Other	Leon Gto	Student
		Unknown	Celaya	Secretary
			Unknown	Housewife
Tlahui	75	Parent	USA	Unknown
		Sibling	Oaxaca	Other (peasant, nanny, mechanic, baker, factory worker)
		Uncle	Mexico City	Practising a profession (lawyer, business person, linguist)
		Cousin	Guadalajara	Musician
		Other	Tamaulipas	Accountant
			Other states in Mexico	Engineer
				Student
				Doctor
				Trader
				Painter
				Housemaid
Tejas	53	Parent	Mexico City	Taqueria
		Sibling	USA	Unknown
		Uncle	Oaxaca	Housemaid
		Cousin	Other states in Mexico	Carpenter
		Other	Unknown	Housewife
				Construction worker

*Source:* own elaboration of data from questionnaire.

Migration destinations varied between the four localities due to the different development of social networks and the type of jobs that the migrants took on in their destinations. In all localities, apart from Lindavista, when internal migration is taken into account, more relatives were reported to be in other localities within Mexico than in the USA. Lindavista was the locality with the highest proportion of relatives in the

USA. This confirms that migration from the hamlets of Tama, such as Lindavista, is affecting the official data on international migration from the municipality. As I discussed earlier, increased USA enforcement policies might be delaying their return.

In Tlahui, while almost 30 per cent of relatives were in the USA, 70 per cent had moved internally, due to stronger social networks within Mexico than in the USA, a higher proportion of skilled migrants willing to apply their skills within Mexico and socio-cultural norms encouraging the return of migrants to the town. These factors, which relate to the specific history of Tlahui, will be discussed in more detail in the next section. Therefore, the official data and the insights from the questionnaire confirm that migration in Tlahui, including that in Tejas, was more internal than international.

The most typical job taken by migrants in Tama, Lindavista and Tejas was at the *taquerias*. In contrast, in Tlahui, 57 per cent of respondents reported their relatives abroad had a professional situation, reflecting the importance that Tlahui has given to the promotion of education and to the different visions of what is valued at the local level and what can be achieved through the migration experience, as I will show.

#### 4.2.3 Poverty

CONEVAL (National Council for the Evaluation of Social Development Policy) is coordinated by the Ministry of Social Development as an autonomous organisation in charge of measuring and offering data on poverty in Mexico. To measure poverty, CONEVAL links economic wellbeing and social rights in a single framework, carried out every five years at the municipal level. In the economic wellbeing category, a minimum level is set indicating the monetary resources (defined by the wellbeing line) required to satisfy an individual's basic needs. The wellbeing line makes it possible to identify those who do not have sufficient resources to acquire the necessary goods and services, both food and non-food.<sup>17</sup> The minimum wellbeing line makes it possible to identify those who, even when using all their income to purchase food, cannot acquire enough of it to ensure adequate nutrition. To do this, the basic food basket<sup>18</sup> is used as a

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<sup>17</sup> The non-food needs include public transport, home cleaning and care, personal care, education, culture and entertainment, communication and vehicle services, housing and conservation services, clothing, shoes and accessories, health care, domestic possessions and housing material, recreation articles and other expenses.

<sup>18</sup> For the construction of the basket, three basic sources were used to analyse the energy and nutrient consumption of the Mexican population: the nutritional properties of each food item, the requirements and recommendations regarding nutritional intake, and the data on expenditure and frequency of food consumption within the household.

reference for the value of the minimum wellbeing line. For example, in March 2017, the value of the wellbeing line (food and non-food needs) had a monthly *per capita* value of MX\$ 1,813 pesos in rural areas and MX\$ 2,819 in urban areas. The minimum wellbeing line (the price of the basic food basket) had a monthly *per capita* value of MX\$ 981 and MX\$ 1,386 pesos in rural and urban areas respectively (CONEVAL, 2017).

As for social rights, a person is considered to be unable to exercise her/his rights when s/he shows deprivation in at least one of six indicators or dimensions: 1) educational gap; 2) access to health services; 3) access to social security; 4) access to food; 5) quality and space of dwelling; and 6) access to basic services in the dwelling. By totalling the deprivations, CONEVAL (2010b) defines the social deprivation index, with the latest results for Tama and Tlahui shown in Table 4.11.

The percentage of the population in poverty in both municipalities was very similar, at close to 80 per cent. However, that in extreme poverty was higher in Tlahui (48.2 per cent) than in Tama (43.7 per cent). Likewise, the percentage of the population with at least three social deprivations was also higher in Tlahui (84.6 per cent) than in Tama (72.7). This can be explained by two main reasons. First, the indicator of social deprivation that differs the most is lack of access to health services. This is much higher in Tlahui (65.1 per cent) than in Tama (32.2 per cent), probably because the regional public hospital, constructed in 2000, is located in Tama, providing better access to health services for the town and neighbouring localities. Tlahui has a Rural Medical Unit but, in cases of emergency, its inhabitants have to commute to the hospital in Tama.

Second, another difference in levels of social deprivation is in the lack of access to basic housing services, including access to basic utilities such as electricity, gas, piped water, drainage and adequate ventilation for cooking. Access is worse in Tlahui (95.6 per cent) than in Tama (81.6 per cent). This can be explained by the much higher level of international remittances in Tama, which allows people to invest in home improvements and cover costs. Interviews with women whose husbands were in the USA confirmed the existence of these investments, and was evident in the better quality and space of their homes.

The lack of access to social security was very high in both municipalities, reflecting the fact that around 90 per cent of the population had limited formal employment, which would have provided insurance against illness or accidents, or have provided old-age



pensions. However, the residents of Tama were, again, able to improve their access to these benefits through the use of international remittances and of internal remittances through the profitable *taquerias*. Vulnerable households in Tama receive more cash in remittances, which may reduce the social deprivations measured by CONEVAL.

**Table 4.11 Poverty indicators, Tama and Tlahui (2010)**

Indicators	Tama			Tlahui		
	%	No. people	Av. social deprivations	%	No. people	Av. social deprivations
<b>Total population</b>						
Those living in poverty	82.3	5,682	3.5	81.9	7,816	3.8
Those living in moderate poverty	38.6	2,663	2.9	33.7	3,216	3.4
Those living in extreme poverty	43.7	3,019	4.0	48.2	4,600	4.1
Those vulnerable due to social deprivation	15.4	1,062	2.6	17.7	1,688	2.9
Those vulnerable due to (lack of) income	0.4	27	–	0.1	5	–
Non-poor, non-vulnerable population	1.9	131	–	0.3	30	–
<b>Social deprivation</b>						
Those with at least one social deprivation	97.7	6,744	3.3	99.6	9,503	3.7
Those with three+ social deprivations	72.7	5,019	4.0	84.6	8,069	4.0
<b>Indicators of social deprivation</b>						
Educational gap	40.1	2,768	4.2	30.5	2,905	4.5
Lack of access to health services	32.2	2,223	4.2	65.1	6,214	4.0
Lack of access to social security	92.7	6,397	3.4	90.9	8,672	3.8
Lack of housing quality and space	34.0	2,350	4.5	32.1	3,063	4.7
Lack of access to basic housing services	81.6	5,634	3.7	95.6	9,121	3.7
Lack of access to food basket	45.8	3,163	4.3	50.0	4,766	4.4
<b>Economic wellbeing</b>						
Those whose income is below minimum wellbeing line	51.6	3,564	3.6	51.0	4,865	4.0
Those whose income is below wellbeing line	82.7	5,708	3.5	82.0	7,821	3.8

Source: own elaboration from CONEVAL data (2010c).

However, in terms of education, Tlahui was better placed, with an educational gap<sup>19</sup> of 30.5 per cent compared to 40.1 per cent in Tama. Two observations can be made regarding the difference in these results. First, this indicator suggests that a higher proportion of people in Tlahui have completed compulsory basic education than have in Tama. This is most probably due to the importance that Tlahui gives to education, and its historical evolution, as will be explained later in the chapter. Second, this difference also reflects the possibility that those who have completed more years of education in

<sup>19</sup> Those meeting any of the following criteria are considered educationally deprived: 1) those aged three to 15 years old, when they lack mandatory basic education and are not attending a formal educational centre; 2) those born before 1982, if they do not meet the minimum mandatory basic education level that prevailed at the time (having completed elementary school); and 3) people born in or after 1982, if they have not completed the minimum current mandatory basic education requirement (secondary school).

Tama migrated and stayed abroad, while those in Tlahui may have migrated but were nevertheless physically present there when the survey took place. As the qualitative overview will show, although in both locations educational migration has been taking place, the first Tlahui professionals encouraged subsequent generations to return for the benefit of Tlahui society. Therefore, this result indicates that higher levels of education do not automatically lead to permanent migration, as the previous evaluations of *Oportunidades* suggested (e.g. Angelucci, 2012; Azuara, 2009; de la Rocha, 2009). Other factors are more important for individuals in terms of their aspirations and decision-making after having acquired more years of education, for example what they value as paths of social mobility, their preference for finding a job in their locality, or social norms that could motivate them to return. I will examine this further in Chapter 6. Therefore, in spite of having higher poverty indicators, Tlahui has better educational indicators – the result of both a more educated population, due to the importance that Tlahui gives to education, and, possibly, of a higher number of educated inhabitants who decided to remain in Tlahui.

The poverty indicators provided by CONEVAL cover the two municipalities; however they do not show the discrepancies that exist between the main towns and their hamlets. These data are provided by CONAPO (2010c) and cover Tama and Tlahui and their respective hamlets of Lindavista and Tejas (Table 4.12)

**Table 4.12 Poverty indicators: Tama, Lindavista, Tlahui and Tejas (2010)**

Community	Tama (town)	Lindavista (Tama)	Tlahui (town)	Tejas (Tlahui)
Total population	2,783	587	3,452	417
Total households	650	136	732	93
% illiterate population over 15 years	22.44	29.43	18.32	31.15
% population 15+ not completed primary school	33.33	46.58	30.10	38.67
% private houses with no toilet	1.08	7.38	0.55	7.53
% private dwellings with no electricity	2.63	11.85	4.10	6.45
% private dwellings with no piped water	4.01	25.19	15.75	24.73
Average no. occupants per room in private home	1.13	1.47	1.42	1.54
% private dwelling with dirt floor	19.10	38.78	15.16	35.48
% homes without refrigerator	60.00	83.82	71.54	88.17
Degree of marginalisation	High	High	High	High
Marginalisation index (0–100)	10.9574	17.0782	11.8051	16.5952

Source: own elaboration from CONAPO (2010c) data.

As shown in Table 4.12, the populations of Lindavista and Tejas have a higher marginalisation index<sup>20</sup> compared with Tlahui and Tama, reflecting their lower levels of

<sup>20</sup> Eight socioeconomic indicators are standardised for the construction of the marginalisation index by locality: 1) proportion of the population aged 15 and over who are illiterate; 2) proportion of the

education and higher deprivation at the household level. The CONAPO data reveal two important results. First, they confirm that Tlahui has slightly worse poverty indicators than Tama – except in education, where they are slightly better. Second, the data also show the great discrepancies that exist in all indicators between Tama and Tlahui and their hamlets. Although Lindavista and Tejas are 15 and 10 kms away from their respective main towns, their levels of poverty and education are much worse. Therefore, the hamlets might be skewing the poverty indicators shown by CONEVAL at the municipal level. In terms of education, the fact that neither Lindavista nor Tejas has a senior-high school influences their lower levels of education. This is important because young people in Lindavista and Tejas face greater levels of poverty. As a result, they may be facing greater barriers that affect the influence that *Oportunidades* has on their education and well-being, including the decisions that they take once they complete junior-high school, decisions which I examine in Chapters 5 and 6.

High poverty indicators are also reflected in the wide coverage of *Oportunidades* – initiated in 1998 in both Tama and Tlahui. In the municipal area of Tama by 2012, *Oportunidades* covered 1,242 households (71 per cent), and 857 scholarship beneficiaries in 25 localities. In the Tlahui municipality, during the same period, it covered 1,557 households (74 per cent), and 1,512 scholarship beneficiaries, in 28 localities (INEGI, 2010; *Oportunidades*, 2012).

Finally, another important indicator is the level of resources that both municipalities receive from federal and state governments (Table 4.13).

**Table 4.13 Federal and state contributions to Tama and Tlahui in Mexican pesos (2016)**

	<b>Tama</b>	<b>Tlahui</b>
Fund of contributions to the strengthening of municipalities	2,962,836	3,888,873
Fund of contributions for the municipal social infrastructure	14,109,816	27,319,518
<b>Total</b>	<b>17,672,652</b>	<b>31,208,391</b>

*Source:* own elaboration from data of the Finance Secretary of Oaxaca (2016).

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population aged 15 years or more without complete primary education; 3) proportion of private dwellings without toilet; 4) proportion of private dwellings without electricity; 5) proportion of private dwellings without piped water; 6) average number of occupants per room in particular dwellings; 7) proportion of private dwellings with dirt floor; and 8) proportion of private dwellings without a fridge. The marginalisation index is shown on a scale of 0 to 100, which was used to facilitate reading and comparisons between localities.

The data show that Tlahui receives much higher amounts of government funding. The first flow (the fund of contributions to the strengthening of municipalities) is slightly higher because the government allocates it according to the size of the population. The second flow (the fund of contributions for municipal social infrastructure) is much higher in Tlahui because the government allocates it according to the level of poverty of the municipalities and the Development Plans that each municipality draws up according to its needs (CEFP, 2017). In 2001 Tlahui established a Council of Municipal Development, which elaborates on the Development Plan. This Council (as explained by the local authorities) designs the plan to target four main areas: agriculture, education, culture and infrastructure. Although Tama also has access to these state funds, it has not formally developed a Council with offices as part of the municipality. Therefore, both earlier literature (J. Martinez, 2011), official data and the accounts of the Tlahui authorities confirm that external relationships in Tlahui are of greater importance than in Tama because Tlahui depends to a greater degree on government resources.

#### *4.2.4 Education*

Most of the population in the four localities had completed primary school, but the data revealed differences between them. As Table 4.12 has shown, in Tama town, 33 per cent of the population over 15 years old had no primary education – this figure rose to 46 per cent in Lindavista. Tlahui had the lowest population over 15 years old without primary schooling (30 per cent) while, in third place, Tejas had 38 per cent. Tlahui had the highest average number of years of schooling (7.74), followed by Tama at 6.93, Tejas at 5.14 and Lindavista, 4.72 (ITER, 2010).

It is important to mention that, in Mexico, there is a wide gap in terms of education between urban and rural schools. There are great disparities between the *telesecundarias* (junior-high schools with teaching delivered by satellite TV, and only one teacher for each grade) to which youths in localities such as Lindavista and Tejas have access, and the technical junior high and senior-high schools found in Tama and Tlahui. Indeed, while in Lindavista and Tejas, primary schools are bilingual (Spanish and *Mixe* spoken), junior high is taught only in Spanish, making the transition more difficult. In contrast, in Tama and Tlahui, primary schools began far earlier – in the 1930s – when the government aimed to homogenise the population through teaching Spanish in indigenous localities. Therefore, the transition to junior high is less

challenging in terms of language, and one teacher is available for each subject. In the four localities, school leaving begins at junior-high school – and the higher the level of education, the greater the leaving age, as shown in Table 4.14.

**Table 4.14 Population not attending school, by age (2010)**

Locality	Tama		Lindavista (Tama)		Tlahui		Tejas (Tlahui)	
	No.	%	No.	%	No.	%	No.	%
Total population	2,783		587		3,452		417	
Population 12–14 years	230		50		225		29	
Population 12–14 years not attending school	14	6.0	6	12.0	9	4.0	1	3.0
Females 12–14 years not attending school	9	7.0	5	19.0	3	2.0	1	6.0
Population 15–17 years	220		50		229		37	
Population 15–17 years not attending school	61	27.0	19	38.0	44	19.0	19	51.0
Females 15–17 years not attending school	18	15.0	9	40.0	22	17.0	12	54.0
Population 18–24 years	400		80		466		55	
Population 18–24 years not attending school	279	69.0	73	91.0	276	59.0	52	94.0
Females 18–24 years not attending school	144	72.0	38	92.0	137	59.0	24	96.0

*Source:* own elaboration of ITER data (2010).

According to the latest data, in 2010 most of the population between 12 and 14 years old were either completing primary school or studying in junior high. Drop-outs increase in the transition to senior high, especially for Tejas and Lindavista, mainly because the pupils need to migrate if they want to continue studying. Likewise, Lindavista and Tejas show a higher proportion of girls not attending school across all age groups. Therefore, although *Oportunidades* has improved the school attendance of girls (Behrman *et al.*, 2008; de la Rocha, 2009; Parker and Scott, 2001), girls from poor localities still tend to start work in the household from an early age and spend more time on domestic chores (Cohen, 2008; Mora and de Oliveira, 2014), showing that gender norms still affect their progression in school.

The number of drop-outs increased in the transition to senior high in all localities – increasing spectacularly in the transition to higher education. Tlahui is the locality where the most young people between the ages of 18 and 24 continued on to higher education, but this proportion is less than half – i.e. 59 per cent of the population did not continue studying. The case of Tlahui illustrates the persistence of barriers (such as economic constraints, a lack of guidance or information about higher education or the inability to pass the entrance exams) that affect the aspirations of the young to continue studying, even where education is highly valued. Indeed, while some youngsters might enrol in higher education institutions in other cities, their economic situation does not necessarily improve while they are there, leading them often to abandon their studies.

Other young people migrate with the intention of studying, but abandon those aspirations once they begin to make their own money. Therefore, economic barriers are an important reason why people are prevented from continuing studying. However, other factors, not measured in previous evaluations, also affect the circumstances of youths in the four localities. These include the migration context, socio-cultural and gender norms or early pregnancy, as I will explore in the empirical chapters of my thesis.

### **4.3 Research sites: qualitative overview**

As I have indicated, international migration is greater from Tama than from Tlahui. Internal migration is equally important in both towns, but different destinations are favoured due to a separate evolution of the type of migration that each town began to undertake, their social networks and the types of livelihood that each town has favoured, as I now show. There are also differences in educational attainment (with indicators being higher in Tlahui than in Tama) yet, in other poverty indicators, Tama is in a better position. In this qualitative overview I examine the possible reasons behind the discrepancies found in the quantitative indicators, focusing my attention on the towns of Tama and Tlahui, as these two localities provide the core of the evidence presented in the following chapters.

I elaborate on the main differences, paying attention to their migration history and context. This will help the reader to understand participants' specific motivations to migrate and the circumstances in which they made decisions after *Oportunidades*.

#### *4.3.1 The Mixes*

Research on the migration of the *Mixes*, in contrast to their Zapotec and Mixtec neighbours, began only recently, variously focusing on return migration (Jimenez, 2012), the impact of migration on the local level (Heber, 2006), the social costs for female migrants (Martinez, 2014), the impacts on the *usos y costumbres* system (J. Martinez, 2011; Ramirez, 2006) and the use of audio-visual media (Kummels, 2016).

The region had been fairly inaccessible and its inhabitants rarely migrated long distances. Beals (1945: 9, 11) described the isolation of the *Mixes* in the 1940s:

The poverty-stricken culture and forbidding landscape operate to exclude outsiders. Consequently, the culture is more self-sufficient than is common

in most of Mexico ... the *Mixe* have been left very much alone in their mountains ... they rarely emerge from their mountains except in groups, the members of which keep together and remain quite aloof from strangers.

Later ethnographic work suggests that, before the construction of the highway in 1966, some agricultural migration had taken place to neighbouring localities in the lower region and to the neighbouring states of Veracruz and Chiapas (Kuroda, 1993). Nahmad (2003) described how the first destinations of these labour migrants, constrained by their limited knowledge of Spanish and their lack of external social networks, had been to other localities within the same region.

Kuroda (1993) recounted that among her informants was an old man who set off for the USA as a *bracero* and who, after walking in the mountains for days, arrived in Mitla City in the foothills and then went on to Oaxaca City, where he was taken by the 'Mexicans' by train to the fields of Sacramento. This appears to have been an isolated case. More-recent studies (Jimenez, 2012; Heber, 2006; Martinez, 2014) mention initial international movements through the *bracero* programme, but none of them could obtain any direct testimonies. Considering the very low quotas that Oaxaca received from the federal government to participate in this programme, it is probable that very few, if any, *Mixes* migrated abroad in this period.

The construction of the first highway did not begin until 1966, connecting first the towns of Ayutla and Tama and reaching Tlahui in 1974. This reduced the isolation of the region (Nahmad, 2003). In that same period, labour migration to Oaxaca City and Mexico City increased, also motivated by the economic boom of the 1960s and 1970s, and the later crisis years in the 1980s when the government reduced the budget to southern states to favour the northern states of Mexico (Cohen and Rios, 2016).

One impact of migration in the *Mixes*, as mentioned earlier for other regions of Oaxaca, has been the complex relationship between migration and the demands of the *cargo* system. In the *Mixe* region, members of the towns elect their own *cabildo* or local government. The *asamblea* (assembly) is the highest decision-making body in the village. In order of hierarchy, the *cargo* rank with the most prestige is the *alcalde*, who has religious and ritual roles. The municipal president, with his/her political and economic responsibilities, is next. The *síndico* (trustee) is in charge of everything related to justice, conflict resolution and the judicial relationship with the outside world.

The *regidores* (councillors) are similarly ranked but are in charge of specific areas such as education, health, construction, etc. At the same level is the *tesorero* (treasurer). Below come all the *auxiliaries* (assistants) of these branches, who are the *vocales* of the different committees. Those who are responsible for the enforcement of town rules, directed by the trustee, are the *mayores de vara* (police chiefs) who have in their charge the *topiles* (lower-grade police). Next come the *secretarios* (chief of staff). The *topil* is the lowest in the hierarchy and is the first *cargo* to enter the system (J. Martinez, 2011: 213). As mentioned, people's right to belong, live and own land in the locality is granted once a *cargo* has been undertaken. In the following section I explore migration and its effects on the *cargo* system in each town.

#### 4.3.2 Tama

##### 4.3.2.1 Migration to the USA

During the 1970s and the 1980s most labour migration from Tama was internal (Jimenez, 2012). According to Kummels (2015), it was not until the 2000s that international migration began in the town. However, the proportion of households with international migration in the 2000s (CONAPO, 2000) was even higher than at the national and Oaxaca levels, showing that international migration started in the 1990s and later intensified.

Jimenez (2012) found that youth migrated to the USA after completing senior-high school or higher education, even if they had labour opportunities in their local areas. He described how youths returned with a new identity, mainly expressed through their clothing, their speaking, their behaviour or their new way of thinking – expressions that, on some occasions, have clashed with the local and more traditional society. This corresponds with my own findings – in Tama, what others had achieved in the USA influenced the decision to migrate of many young people, as I discuss in more detail in Chapter 5.

There are several possible explanations for how or why this migration started or who the first migrants were. International migration was motivated by greater opportunities and higher wages in the USA during the 1990s. This economic motivation also increased migration at the national level. How it started and was sustained can be hypothesised by social networks theory (McKenzie and Rapoport, 2010; Winters *et al.*, 2001) and by the fact that *Mixes'* ties with their Zapotec neighbours, who increased their own migration in the 1980s, could have helped them to migrate. Another possible



explanation is Tama's ties (possibly serving as 'bridges') to *taquerias* in states (Guanajuato, San Luis Potosi, Jalisco) with high migration to the USA. People from Tama could have accessed the social networks of other migrants to get the necessary information and minimum assistance to migrate. Once these resources began to spread in the town, migration sustained itself, creating more movements (Massey *et al.*, 1993, 1994b). This theory is backed up by my finding that some migrants with USA experience migrated first to the *taquerias* in these states and then to the USA.

Although several studies show a decrease in Mexican undocumented migration (Massey, 2011; Passel and Cohn, 2016), my own field research found that some undocumented migration in Tama has continued, one explanation being Tama's initial 'cumulative' stage of migration (Massey *et al.*, 1994b) that still motivates people to migrate helped by their solid social networks and the availability of jobs in *taquerias* and the agricultural sector. Another explanation is family reunification, confirming that border enforcement both reduced the likelihood of undocumented migrants returning (Massey, 2011) and increased migration from their families and partners in the USA (Zamora, 2014).

All the participants in my study with USA migration experience relied on a paid border-crossing guide (*coyote*), usually from Tama town. In most cases they borrowed the money from their relatives in the USA, paying different amounts depending on whether they crossed in the mid-2000s (US\$1,700) or after the 2010s (US\$4,500) – the increase in price mainly due to higher border enforcement (Massey *et al.*, 2009; Zamora, 2014). A majority of participants crossed the Sonora–Arizona border on foot through Nogales or the Sasabe Desert – the new but also more dangerous route since the militarisation in the 1990s of the previous main corridor, Tijuana–San Diego (Massey *et al.*, 2009; Zamora, 2014). In addition to these costs, participants had to finance their trip from Oaxaca to Sonora, usually by air, and the cost of traditional rituals prior to departure, while some others mentioned a payment to drug traffickers in Sonora to be allowed to continue crossing. The enforcement of the border has resulted in increased physical and psychological abuse, not only by criminal organisations but also by US and Mexican authorities (Slack *et al.*, 2016). Although this increased enforcement discouraged participants from crossing the border, most still decided to migrate to other destinations within Mexico.

#### 4.3.2.2 Internal migration

Although other types of internal migration (such as seasonal or educational) have been taking place in Tama, the most frequently mentioned type of internal migration is that to the *taquerias*. The *taquerias* are a very important source of employment for people from Tama, and many youths after junior or senior-high school took advantage of their social networks and migrated to work in them, as a teacher from Tama confirms:

Usually here, one of the primary economic activities is the *taqueria*, and most people who have their own business now give employment to the youth as *taqueros*. There are many people who migrated from here some years ago, established their business in other states and started up their *taquerias*, then they themselves are pulling new people from here to work there. That's many people's main job here

*Taquerias* are described as places where everyone is able to find a job, no matter their level of education, while also offering the possibility of progressing:

What I like about the *taquerias* is that the waiters, when we arrive, they dress us up as if you were high class, with polished shoes, trousers, white shirt, well groomed, and that's how you serve people ... the *taquerias* demonstrate to us that those who are not necessarily very intelligent or who didn't have opportunities can progress, you don't feel that studying is the only way to survive ... there is a place for everyone at the *taqueria* ... we see them as a way of self-improvement, as a way to have money, a house, a car (male, 28, return migrant from Celaya).

The types of job in the *taquerias* are usually gendered. Women work as waitresses, they clean and their job in the kitchen is limited to making the sauces for the *tacos* and *tortillas* or washing the dishes. Male jobs include waiter, cook, cook's assistant and dishwasher. The cook has the highest position and the highest salary, as he is the one who cuts and cooks the meat. The waiters and waitresses make the most money from tips and the dishwashers the lowest. Therefore, men are likely to have a higher income as they can start as a dishwasher or waiter and, if they have the skills, can progress to becoming a cook, while women mainly make the sauces, clean and serve the tables. The conventional occupational stereotype in Mexico is that women are homemakers and perform household duties while men are economic providers (Milicevic, 2010;

Tepichin, 2010). There is evidence that these ideals are still present in both the discourse and the practices to which young people are exposed in Mexico (Milicevic, 2010), and that Oaxacan indigenous women are likely to perform highly feminised jobs when they join the labour market (Amaya *et al.*, 2012). Therefore, in Tama, these perceived differences in skills can be linked to gendered employment stereotypes in the town.

The *patrones* (owners of the *taquerias*) are first-generation *taqueros* who migrated to other states in Mexico. Franco (2014) described the history of the *taquerias* from Tama and the first Tama *patrones* in the city of Celaya in Guanajuato. He found that 40 per cent of *patrones* he interviewed arrived in the 1980s, followed by another 40 per cent who arrived between 1990 and 1995. A further 13 per cent arrived between 1995 and 2000, and 7 per cent between 2000 and 2005. Some 80 per cent of those in his sample had migrated first to Mexico City, where they worked in other *taquerias* or restaurants and learned the business, but it was not until the 1990s that the first businesses began to be established in Celaya. Around 53 per cent were aged 26–40, with 33 per cent over 40. Although Franco's (2014) study showed that the *patrones* mostly had low levels of education (53 per cent with primary school or lower), I found that many young males aspired to work in the *taquerias*, influenced by the image and, as one informant stated:

The *taqueria* can make you earn more than anyone, even more than a doctor or the president. From a good sale, you can make MX\$25,000 (US\$2,000) per night and you can have different *taquerias*... for example, my *patrón* went to the USA to see Paquiao (the boxer) without any problem. That's when you think 'I want to be like him, I want to make good money so I can spend and enjoy, I want to see an NBA basketball match, or the NFL, many things' (male, 27, return migrant from Guanajuato).

The *patrones* are admired and appreciated by the population – evident during parties in the town when they returned to visit and were able to make the most of this crucial moment to show their economic success by donating a prize in cash or hosting the music band, and demonstrating their continued ties and belonging to the town. They were perceived as businessmen carrying lots of cash, dressing differently and showing a different lifestyle from that in the town. It was not only their image which influenced the young but also the money that they brought on their visits:

The *patrones* you can notice them instantly. They bring at least the latest Chevrolet Avalanche or a Harley Davidson or an Escalade that are normally used by the *narcos* (drug traffickers), and they are practically like *narcos* because they have that type of lifestyle with all the money they have, and because their children are always protected ... also they bring beers and everyone wants to stay close to them ... when you start to grow up you get influenced by what you see, right? (Male, 20, return migrant from San Luis).

Young *taqueros* also returned during the parties, when they could afford it, to show off their economic success. People in the town noticed them, as they returned wearing clothes 'from the outside', and money to buy presents or different items that allowed them to display their economic status in the cities. However, although the *taquerias* offered young *taqueros* a regular income, the way they used their money did not necessarily improve their economic wellbeing. For example, a 28-year-old male return migrant from Celaya said that young men's main activity after work was gathering with their friends from Tama and spending an important part of their income on alcohol:

Young people, we always find jobs in *taquerias* ... many of us we go out to drink and don't save anything, only alcohol. In my case I was always working but at the end I was spending everything on alcohol, and I didn't bring anything back to the community ... the little I saved I spent with my co-workers, but I didn't realise I was spending most of my income on that, I never thought about how I was going to make a living if I returned here ... life gets so routine that you don't find any other escape and by the time you realise it, you don't even have a *peso*.

As Bañuelos (2006) observed, young men mostly used their income on alcohol and personal items, illustrating the idea that, although migration is used to overcome the lack of opportunities at home, youths also undertake migration to experience greater freedom of personal expression and behaviour (de Haas, 2006: 577). However, there were cases of males who migrated for a shorter time in order to earn and save money, as this 23-year-old male return migrant from Aguascalientes:

Some people work for years in the *taquerias* or they don't come back. I went only for eight months and it was useful to get some experience of how they work and to save some money. It was a short time but it was a good

experience ... to know about life beyond the community, to know the city, because I had never been further than Oaxaca. In eight months I used that money to buy myself a computer and other devices that I use for my job. After that I returned to Tama ... it was difficult because, when my co-workers invited me to drink and I refused, they said 'Hey, do you think you are superior or why won't you drink with us?' but I was there for a purpose.

Earning and saving money was considered to be easier at the *taquerias* than in other types of job, as youths were given free food and free or cheap accommodation by the *patrones*. The flows of money from such internal and international migrants inevitably impacted on the *cargo* system.

#### 4.3.2.3 Migration and the *cargo* system

Instead of forcing them to possess a *cargo*, Tama allows migrants to send money so they can contribute to, and continue to be recognised as members of, the town. Key actors narrated that this practice began in the 1970s with the first professionals who were working outside Tama and preferred to pay a substitute, usually a relative or someone who lived in Tama, instead of holding a *cargo*. This continued gradually as more inhabitants began to migrate in the 1980s. However, paying substitutes or donating cash were reinforced and considered common practice until the 1990s, when the *patrones* and international migrants began to contribute larger sums of money. This adaptation allowed the local authorities to receive large financial donations from better-off migrants, such as the *patrones* or those in the USA. The educational councillor explained, in 2014:

Before, the person who donated the big prize was the *capitán* who was in charge of feeding people and looking after the musicians during the party. Also, the person who donated handcrafted fireworks did it either out of pleasure or after an illness – as appreciation during the Holy Spirit (*Espíritu Santo*) Party (see Figure 4.9). Nowadays, it is not a matter of a promise, but more of avoiding election for a *cargo*. Here, a person who thinks he or she will soon be elected, those who are within Mexico and cannot leave their business unattended, or those who are in the USA, for them it is better to say 'Let's donate a prize for the party' or 'I want to donate the fireworks' or 'I donate in cash' because those who give a donation of a prize, fireworks or

cash preferred to donate their money instead of returning to hold a *cargo*. Depending of the amount of money they donate, they get a certificate from the local authority saying that they can not be elected for the following three, four or five years – that's why people who are abroad prefer to donate.

**Figure 4.10 Espiritu Santo Party**



*Note:* a woman directing a sacrifice during the Espiritu Santo Party. Behind can be seen a firework construction donated by a migrant.

*Source:* photo taken by the author.

Therefore, the town party was a crucial moment for migrants. Those who wanted to avoid the *cargo* donated money and prizes for the different activities at the party, or for other special celebrations such as sporting events. Those who usually participated with the biggest donations requested by the local authorities were the *patrones*, due to their wealth. These covered things such as the firework constructions for the parties, the silver trophies for the regional basketball competition (which Tama hosts every year) or donations for the bull riding, including decorations, cash and presents for the riders. Migrants also contributed by hosting the musicians from Tama or neighbouring localities. The person hosting the band not only had to give food and drinks to the musicians, but also to anyone who came to his house. Another option migrants had was to find a substitute, to whom they had to pay a salary, including expenses, such as the

cost of preparations for the rituals. Some *patrones* who chose to pay a substitute also offered additional donations during other celebrations in the town.

Thus, both internal remittances from the *taquerias* and international remittances were important sources of income, received during the parties and other important events of the town, while considered as a *cargo*. Although most *patrones* did not have their children or their wife living in Tama, giving a *cargo* was very important because their parents lived there. In making these donations, *patrones* preserved their right to own land and build houses in the town. Some reported their intention to return on their retirement. Thus, the *taquerias* were not only a source of income for migrants but were also a way of maintaining social relations, status and belonging in the community.

### 4.3.3 Tlahui

#### 4.3.3.1 Internal migration

In contrast to the emphasis on migration to the *taquerias* and the USA in Tama, a distinctive characteristic of Tlahui is its focus on education (and educational migration) as a way to achieve its own vision of integral ‘community’ development (Heber, 2006: 5).

In Tlahui the origins and the evolution of this interest in education from a *Mixe* perspective can be traced to three factors:

- the arrival and acceptance of the Salesians (an order of the Catholic Church with an emphasis on education) in the 1960s and their role in sponsoring students interested in migrating to continue their studies;
- the role of these new professionals who, on their return, became agents of change; and
- the ability of these professionals to build relationships with government officials, who then guided and supported Tlahui in its efforts to achieve its educational projects.

I now examine these three factors historically.

Following the Mexican Revolution (1910–1917), federal primary schools in Oaxaca were established with the goal of homogenising the population. This involved teaching in a single language (Spanish) and integrating the different ethnicities into a national *mestizo* identity (Siguenza, 2007). In Tlahui itself, the federal primary school was established in 1934 (Namhad, 2003) while, in Tama, this occurred in 1933. The first

teachers came from the Zapotec region, and their duty was mainly to teach Spanish (Comboni *et al.*, 2005). In both towns, teachers represented the government and were responsible for transmitting the idea that the state was interested in their progress (Siguenza, 2007). Privileged and paid by the state, these first teachers avoided having to work in agriculture by teaching in ‘normal schools’.<sup>21</sup> Influenced by them, a few young people in Tlahui and Tama began to move away to study and become teachers themselves.

Primary schools did not offer all grades when they were first implemented, but Gallardo (2013) recounts that, in the 1940s, local authorities in Tlahui began lobbying the government for more teachers offering more grades. Although the local authorities of both towns felt that the populations were not interested in education in the 1940s and 1950s, in Tlahui foreign teachers took the initiative to improve the educational conditions of the places where they were allocated, while Catholic priests encouraged children to attend school (Gallardo, 2013; J. Martinez, 2011). While in Tlahui, the first generation of children to complete primary school graduated in 1959 (Gallardo, 2013), in Tama this reportedly did not happen until 1968.

The influence of the church increased in 1962 when Salesian missionaries arrived in Tlahui. This was, according to the current priest, at the request of the people. In 1972 the Salesians established Tlahui’s primary school, *Xaam*. Juan Bosco, who founded the Salesians, had a great interest in promoting the education of the young, especially the poor, and encouraged missionaries from Italy to migrate to Latin America from the 1880s (Ceja-Bernal, 2014). Bosco aimed to offer quality education to the rural poor, who migrated to the cities to increase their chances of better job opportunities (Ceja-Bernal, 2014). He also promoted in his students an ideology of social commitment for communal benefit. Therefore, the Salesians, who are required to identify themselves with Bosco’s ideals, sponsored the migration of Tlahui students to Salesian schools in other Mexican cities. In the 1960s, the Salesians in Tlahui (led by Fr Leopoldo Ballesteros, who learned to speak *Mixe* himself) supported a discourse of recognising indigenous spirituality and theology (Kraemer, 2003; J. Martinez, 2011), and

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<sup>21</sup> Built in the 1920s, these ‘normal schools’ were explicitly designed for the children of agricultural workers, and promised the young people a chance to escape the poverty that characterised the rural population. Very quickly, teachers were trained to teach reading and writing, including the introduction of new farming techniques. Rural normal would be one of the only ways in which farming families could rise socially (Padilla, 2009).



sponsoring some of the first Tlahui professionals (such as Floriberto Diaz, Mauro Delgado and Donato Vargas) who migrated to study in the 1970s and returned to become agents of change. Although none followed a religious education, they were undoubtedly partly influenced by Salesian ideals of work for the benefit of one's own people.

The Church was unable to achieve the same results in Tama, where the population was reportedly more involved in traditional *Mixe* religion and more reluctant to accept missionary involvement. The importance of the Catholic Church in Tlahui is reflected on the right-hand side of the mural at the main entrance to the municipal palace (see Figure 4.11).

**Figure 4.11 Mural at the main entrance to the Tlahui municipal palace**



*Source:* photos taken by the author.

Meanwhile, in Tama, the first generation with primary school education found the means to continue studying and did not remain inactive. Students who graduated in 1968 from the primary school, along with other Tama students who studied abroad, succeeded in 1972 in opening the first secondary school in the high *Mixe* region. Tlahui students who wanted to continue studying at secondary school usually migrated to Tama until the normal school they lobbied for was built in 1976 (Acunzo, 1991). At this point, education was considered a means of social mobility and a pathway to national society (Nahmad, 2003; Siguenza, 2007). Nevertheless, education began to evolve in different directions in both localities, as is now reflected in the current higher

educational indicators shown in the previous section. In Tlahui, the involvement of the church increased the size of the educated population, motivating youths to continue studying and sponsoring them to migrate if they wanted to study in other Salesian schools in Mexico. The church became a link for Tlahui to wider Mexican society for those who aspired to migrate to continue studying. In contrast, in Tama, the lower educational indicators suggest that its inhabitants completed fewer years of education but also possibly that lower numbers of educated inhabitants decided to return. The type of migration that became more accepted in Tama was that to the USA and to the *taquerias*, because international migrants and the *patrones* donate large amounts of money to their households and the town. During the parties, international migrants and *patrones* who have returned send the message, through their generous donations and demonstrations of wealth, that labour migration to the *taquerias* and to the USA is more profitable than education and that another path to social mobility exists. As a result, they have become role models in Tama while, in Tlahui, the role models were those who returned after their studies with access to stable jobs and social respect. Here, in addition to the church, other circumstances took place that caused education to evolve differently. In particular, former educational migrants, including Floriberto Diaz and other professionals of his generation, who were initially sponsored by the church, decided to return and pushed for changes in the educational system and the identity of Tlahui as a society.

In Tlahui, from the 1970s, both social networks and the educational system expanded, and greater numbers of indigenous professionals who had studied in the cities returned to become teachers and authorities in the *cargo* system. One of them was Floriberto Diaz. An altar boy of Leopoldo Ballesteros, he was sponsored by the Salesians to study at a normal school and, later, theology at university. Kraemer (2003) described how, at this point Floriberto, according to Ballesteros himself, suffered from an identity crisis that he solved by embracing his *Mixe* identity. He abandoned theology and began to study anthropology in Mexico City, graduating with an undergraduate thesis entitled 'The autochthonous policy', based on fieldwork he conducted in Tlahui (Kraemer, 2003).

In 1974, Floriberto, Donato and Mauro returned to Tlahui 'bearing a set of neo-indigenist ideas, backed up in the ethnic discourse of the Indian movements, bringing with them concerns to push transformations at the communal and regional level' (J.

Martinez, 2011: 198). They founded the Committee for the Defense of Natural and Human Resources of the *Mixe* Region (CODREMI), from which they promoted initiatives to consolidate the *Mixe* region as an area of ethnic claim (J. Martinez, 2011). Gallardo (2013) described how this group, especially Floriberto, motivated the professionals of that generation (mainly teachers) to return to Tlahui, promoting a *Mixe* discourse with the value and teaching of the local.

These new professionals perceived with more clarity the submissive history of indigenous groups and their subordination in all aspects of decision-making, including education (Namhad, 2003). Conscious of the ethnic discrimination against them in wider Mexican society, they were able to fulfil themselves in their rural homelands, ‘avoiding a system of exploitation and misery in which they would be condemned if they stayed in the city’ (Acunzo, 1991: 104). The result was a questioning of their subordinate role that led to the revaluation of and pride in their traditional culture, reinforcing the *Mixe* identity, as shown in Figure 4.12.

**Figure 4.12 Board in the Town Hall in Tlahui, showing the town and the surrounding region in the *Mixe* language**



Source: photos taken by the author.

These new leaders promoted educational projects with local content (including *Mixe* language, culture and knowledge) to solve specific local problems, while negotiating with the Ministry of Education for the recognition of degrees, and providing the necessary budget (Gallardo, 2013). This negotiation was facilitated by the connections that Floriberto made with key federal authorities in Mexico City, including the

Secretary of Public Education (Miguel Limon Rojas) and the son of President Echeverría (Gallardo, 2013). Some of these connections were probably made when he worked at the Ministry of Education. Floriberto Díaz died in 1995 aged 44. However, these contacts with key figures in both state and federal government, including Oaxacan Governor Diodoro Carrasco, were maintained into the 1990s (Gallardo, 2013).

The ‘self-managing projects’ that Tlahui professionals and the local authorities promoted began with basic education, with the secondary school ‘Sun of the Mountain’ (1979–1984), and went on to include institutions of higher education such as the Technological Institute of the *Mixe* Region (ITRM) created in 2000, and the recent Intercultural Community University of the Cempoaltépetl (UNICEM). Also of great importance is the *Mixe* Centre for Musical Training (CECAM) under its current Director Mauro Delgado (who also studied abroad with the assistance of the Salesians) which highlights the musical prestige that Tlahui has in the region and country.

The above generation of professionals believed that state education:

- caused identity problems in children and youth;
- did not include the *Mixe* language;
- intensified migration;
- made young people feel ashamed to be *Mixes*; and
- transmitted values that promoted individualism (Gallardo, 2013).

They therefore organised a strong movement of cultural resistance and promotion of the *Mixe* identity. In Tama, this did not happen because, according to local interviewees, the policies of the Mexican state succeeded: the population, instead, valued learning Spanish and the education provided by the federal schools.

In Tlahui, primary and junior-high schools are state schools taught in Spanish (but Tlahui’s primary school teachers also speak *Mixe*); however, when students reach senior-high (the BICAP), the language is reincorporated so that students can reinforce their *Mixe* identity. Teachers and founders of the BICAP, initiated in 1996, studied abroad and obtained an undergraduate degree or higher. Their aim is to prepare their students and to spread the importance of *Mixe* identity, in which Tlahui has taken a leading role, promoting the value of the *Mixe* identity and traditions and calling for their recognition by the state.

However, as a 46-year-old BICAP teacher, a return migrant from Oaxaca City, confirmed, the local authorities have had to negotiate with the state over the creation of these institutions, as well as their curricula and economic support:

We dreamed of having a different institution ready to respond to the needs of the youths of the community and the region ... and there were many changes ... but the government doesn't let us keep all the curriculum as we designed it from the beginning and, little by little, the state started to take from us the dream that we began ... so the community has had to negotiate to avoid the project being shut down.

One example was the junior-high school 'Sun of the Mountain', which closed because the government interpreted it as a space of disruption, cut the funding and opened a federal junior-high school (Gallardo, 2013). However, the discourse of *Mixe* education has shaped the aspirations of youths, who have also valued education not only as a personal benefit but as something that will also help Tlahui. This, together with their obligations to hold *cargos*, often manifests itself as a pressure to return after their studies, something I discuss further in Chapter 6.

It is important to note that, although educational migration has been highly promoted, other types of migration have been taking place. As mentioned, people from Tlahui migrate to Puebla, Oaxaca City or Mexico City. Heber (2006), in her study of the impacts of migration in Tlahui, found that most migration was temporary and internal, for the purpose of work or study. She described how most people found jobs in restaurants, as housemaids, in construction or in gardening. J. Martinez (2011) highlighted the importance of agriculture for many families and revealed how the heads of households migrated temporarily, mainly to Oaxaca City and Mexico City, in order to buy agricultural inputs. Indeed, the local authorities calculated that each head of household spent between 90 and 120 days per year working outside town.

As Tlahui's migration context differs from Tama, so does the way it interacts with the *cargo* system.

#### 4.3.3.2 Migration and the cargo system

As the region became more connected with the rest of the state, the level of the *mestizo* cultural invasion in Tlahui was significantly lower compared to the neighbouring

localities, and the language and traditions were conserved, as J. Martinez (2011: 178) illustrated:

Tlahui is an extremely traditional community ... the references to its past and its traditions are constant, and its 'romantic' vision of identity is a source of pride and distinction. This feeling, which is shared collectively, is relevant for understanding the normative dimension of the community, as the reproduction of its norms, the acting of its authorities and the social control are legitimized, largely, when they are supported in the traditional discourse of the town.

These values and pride in the town's identity were not created in a vacuum. The Catholic Church has transformed Tlahui in fundamental ways not seen in Tama through the promotion of education and traditional values. The main characteristic of the local authorities had been their knowledge of the traditions of the town and its norms. However, as a result of the '*cacique*'<sup>22</sup> period between 1930 and 1950, new values were introduced, such as the ability to understand the meanings and knowledge of the outside world: to speak Spanish, to write, to read and to know how to move in Oaxaca City. The Catholic Church was an important link to this outside world when the Salesians began to sponsor Tlahui students to migrate and to gain these skills in other cities within Mexico.

Yet, during the 1970s, another important change in Tlahui's *cargo* system occurred. The same political group of professionals (Donato Vargas, Mauro Delgado and Floriberto Diaz) began advocating changes in the *caciquismo*, which had already lost its old influence in the region, and proposed a strategy to re-value *Mixe* traditions. They, followed by other teachers who returned to Tlahui after their studies, participated in the *cargos* themselves or advised the local authorities and began implementing reforms to adjust to the new circumstances. These new reforms included universal access to the *cargos*, emphasising the strictness of the hierarchy, and renovating the discourse of tradition and the *Mixe* culture as a collective right (J. Martinez, 2011). People in Tlahui

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<sup>22</sup> The *cacique* was the figure of authority in local towns designed by Spanish colonisers. After the Mexican Revolution, the *cacique* acted as the broker between the state and the territories he (*caciques* are generally male) controlled. He transmitted to his people the projects and aims of the party (the PRI) providing the party with the contacts as well as a network of peasants to sustain its discourse. See de la Peña (1986) for a full explanation of the *cacique* and J. Martinez (2011), who explains the role of the *caciques* in the *cargo* system in Tlahui.

undertake *cargos* for three main reasons, which Gallardo (2013), himself from Tlahui, explored:

- they are a way to give '*tequio*', in the sense of a service of benefit to the entire population;
- they are part of 'the way of living' that has been transmitted from generation to generation. Although the *cargo* system has been passed down through the generations, this is not necessarily a reason why Tlahui inhabitants undertake the practice. The *cargo* is considered an obligation and people do it because otherwise their rights as inhabitants can be removed along with their social recognition. Although wealth differences exist, the *cargo* also works as an economic levelling mechanism ensuring that inhabitants keep within certain limits. Finally,
- they strengthen local power in the way in which they teach the inhabitants how to stand up for themselves, especially in relations with those state authorities with whom Tlahui has to negotiate economic resources for their local projects. This continues, illustrating the tension between Tlahui's discourse of autonomy and their ongoing need for external funding.

The *cargos* are also considered like a school, where the inhabitants learn to 'work for the benefit of the people, new values are obtained, behaviour norms, and responsibilities' (Gallardo, 2013: 169). In contrast to Tama, the local authorities in Tlahui did not benefit directly from the contributions of migrants, and donations were not considered a substitution for the *cargo*. Although migration was common, the local authorities considered that only people living in the town could be elected for a *cargo*. To pay a substitute was not common, as this educational councillor from the local authorities explained in 2014:

Here the substitutes are not common, only for *cargos* that involve fewer responsibilities, the rest of the people have to undertake the *cargo*. People here don't care how you are economically or what your family situation is. You can simply get elected and that's it. Most of us who are given the *cargo*, it is because we are living here.

People were warned when their turn to hold costly *cargos* approached, so that they could save. Inhabitants usually stayed in the town after their *cargo*, motivated by the prestige that they had accumulated while, in Tama, many people chose to migrate again

in order to repay their debts. Also distinct from Tama, in Tlahui the expenses of the parties were not covered by migrants, but funded by the budget that the town received from the state.

However, local authorities highlighted the fact that many inhabitants were able to hold *cargos* thanks to their children, who were working abroad and who sent money. Thus, it seems that Tlahui also benefitted from internal remittances that contributed to the *cargo*, but in a less evident and institutionalised way. Although the amount of money which internal migrants could send was probably not as high as in Tama, this extra income could be important for households to cover their consumption or other expenses. For people in Tlahui, to reject a *cargo* was described as almost impossible, as the consequences ranged from loss of prestige and an inability to participate in the assemblies, to the restriction of certain rights and services provided by the municipality, such as water or the issuing of certificates (J. Martinez, 2011).

In Tlahui the importance of the *cargo* maintained its traditional gravity and reflected the greater pride that Tlahui took in tradition in general. In contrast to Tama, where being elected for a *cargo* was related to a person's wealth, in Tlahui it was more related to experience, age and knowledge of the local context. The *cargos* are thus an essential component of Tlahui's norms of locality, and those who live abroad are discredited (J. Martinez, 2011). I confirmed this with my participants in Mexico City, who did not return to undertake the *cargo* and considered themselves as having been expelled from Tlahui.

The traditional vision of the *cargo* system, though highly respected and recognised, also created disagreements, tensions and clashes between different sectors of the town, including those who migrated for different purposes. I illustrate the consequences of the *cargo* on migration decisions in Chapter 6.

#### **4.4 Summary**

This chapter has presented the characteristics of Mexican migration. I have argued that, while most attention has been given to international migration in Mexico and Oaxaca, internal movements had been and remain higher. I presented data on the demographics, migration and socio-economic indicators of the two towns in my study and of their hamlets, Lindavista and Tejas, when the data were available. While Tama is better positioned in terms of socio-economic indicators, reflecting the economic impact of



remittances at the household level, Tlahui is better off in terms of education, showing that its inhabitants are more educated and raising the possibility that educated migrants more consistently returned to their hometown than those from Tama. I showed that Tama has greater flows not only of international migration, than Tlahui, but also to internal destinations where the *taquerias* are established. The high flows of migration in Tama have modified the traditional *cargo* system. Migrants contribute with large amounts of money, notably during the town parties, which enables them to avoid being elected for a *cargo* and having to return.

In Tlahui, labour and educational internal migration are more common. The town has developed self-managing projects aimed at promoting *Mixe* identity and stressing the importance of education. The educational migration that began to take place in Tlahui, especially from the 1960s, evolved differently than in Tama for three main reasons:

- the arrival of the Order of the Salesians, which sponsored the migration of young people for study;
- the return of the first professionals, who became agents of change; and
- their ability to build personal relationships with political elites and obtain resources – with certain limitations – from the Mexican state to undertake educational projects from a *Mixe* perspective.

Educational migration has been taking place among the population influenced by this first generation of professionals. Migration has not modified the *cargo* system in Tlahui as it has in Tama. The *cargos* are a key source of status, where being physically present to participate in the duties gives individuals recognition and prestige whilst, in Tama, this status is affected by the wealth accrued through migration.

These different strategies for achieving social mobility (including what each town chooses to value) have affected the migration decision-making of young people. The role of *Oportunidades* has therefore had different effects on their aspirations and decision-making. In the next chapters I explore in more depth the decision-making of beneficiaries and the influential factors in each town.

# 5

## **Tama: The decision to migrate, the influence of *Oportunidades* and the life trajectories of former beneficiaries**

The following two chapters present empirical evidence on the decision to migrate of former *Oportunidades* beneficiaries from Tama and Tlahui, and their trajectories after the programme – beginning with those from Tama. They also examine the aspirations of current beneficiaries, including those from the hamlets (in this chapter, Lindavista) and reveal the influence of *Oportunidades* in localities with different school characteristics.

First, I present the overall results of my sample, then draw on three case studies to illustrate the factors that shaped former beneficiaries' aspirations and decisions on whether or not to migrate. I also explore the trajectories of those who migrated internationally and internally, and whether their aspirations and decisions changed once they reached their destinations. In the third part of the chapter, I examine in more detail the factors that influenced former beneficiaries' migration decision-making processes, compared with those of non-beneficiaries. In the fourth part of the chapter, I analyse the aspirations of current beneficiaries and their migration decision-making process in Tama and Lindavista. I argue that *Oportunidades* influenced the decision to migrate when former beneficiaries increased their aspirations to study. However, the shaping of aspirations depended on other factors such as the migration context of Tama and household-level factors which, in some cases, affected the intended goals of *Oportunidades*. I argue that, for current beneficiaries from Tama, their aspirations and the factors that shaped them were similar to those of former beneficiaries. However, in Lindavista, the migration context, the more difficult economic circumstances and the lower levels of education at the household level had a different influence on the aspirations of beneficiaries and their decision to migrate. The lack of educational aspirations affected the influence of *Oportunidades*.

### 5.1 The influence (or not) of *Oportunidades* on the decision to migrate

Although the following sections deal with ‘former beneficiaries’ from Tama, from now on I will refer to them simply as ‘beneficiaries’ in order to facilitate the reading of my findings. The first important outcome of *Oportunidades* to highlight is that beneficiaries in Tama completed more years of education compared with non-beneficiaries, as Table 5.1 shows. Of the non-beneficiaries, only two completed senior-high school, one migrated to continue studying for a degree (but was in Tama working temporarily to finance her studies) and the other migrated to work in the USA. One non-beneficiary completed junior-high school and migrated to the USA, whereas a majority only completed primary school, three migrating to work within Mexico (two in *taquerias* and one in Caborca) and three to the USA. I found no non-beneficiaries with no migration experience.

**Table 5.1 Summary of levels of education, migration decision and the role of *Oportunidades*, comparing beneficiaries and non-beneficiaries**

Beneficiaries					Non-beneficiaries			
Level of education achieved	Total	Migration decision	Total	<i>Oportunidades</i> ’ influence on education and migration decision	Level of education achieved	Total	Migration decision	Total
Senior- high school completed	19	Migrated to continue studies in Mexico	10	Completed senior-high; increased aspiration to continue studying and migrate	Senior-high school completed	2	Migrated to continue studies in Mexico	1
		Migrated to work in Mexico	4	Completed senior-high; led beneficiaries to delay decision to migrate			Migrated to work in USA	1
		Migrated to work in the USA	2					
		No migration	3	Completed senior-high but no influence on decision to migrate				
Dropped out of senior-high	4	Migrated to work in Mexico	1	Some years of senior-high but no influence on migration decision	Junior-high school completed	1	Migrated to work in USA	1
		Migrated to work in the USA	3	Some years of senior-high but no influence on migration decision				
Completed junior-high school	4	Migrated to work in Mexico	2	Some years of junior-high but no influence on migration decision	Primary school completed	6	Migrated to work in Mexico	3
		Migrated to work in the USA	2	Some years of junior-high but no influence on migration decision			Migrated to work in USA	3
Total	27				Total	9		

Table 5.1 shows the completed levels of education of beneficiaries, the migration decisions that they took, and the role that *Oportunidades* had on their education and the

decision to migrate. From 27 interviewees, 19 completed senior-high school while eight dropped out of the programme: four in senior high and four in junior high. They abandoned their studies for reasons that will be explored later in the chapter. From the 19 beneficiaries who completed senior high, 16 had migration experience. Of the three beneficiaries who did not migrate, all were female. Gender roles and their ideas of what women should do played a role in their decision to not to migrate as I will show in the chapter.

From the 19 beneficiaries with senior-high school, 10 migrated, aspiring to continue studying (either for a degree or a technical course) confirming that *Oportunidades* increased migration in the long-term of those individuals who increased their human capital, as suggested by previous evaluations (Azuara, 2009; Parker and Gandini, 2009; Stecklov *et al.*, 2005). However, the literature was unclear on why and how beneficiaries with long exposure to *Oportunidades* decided to migrate. De Haas (2011) argued that increased levels of education and access to information affected the aspirations of individuals and the awareness of better opportunities abroad and that, in contexts where structural differences are present, the desire to migrate in order to achieve life aspirations is more likely to develop. Therefore, it is possible that, in the 10 cases of beneficiaries who completed senior high and migrated to continue studying, *Oportunidades* contributed to the increase in the number of years spent in education, influenced their aspirations to continue studying, as the programme intended, and affected their decision to migrate in order to achieve these aspirations. In these 10 cases, education became valued and perceived as leading to a better life, with migration being the means to achieve this aspiration. Migration had an instrumental role in providing education and achieving broader aspirations in life, a finding which matches those of Carling (2014).

However, not all 10 participants who migrated to continue studying were able to achieve their aspirations. Four dropped out or chose a technical career because they could not afford or were unable to enrol at university. They formed new aspirations but, at some point, returned to Tama to work (usually in a small family business) or became self-employed. Their aspirations therefore changed at destination and, in some cases, the failure to realise them motivated beneficiaries' decision to return to Tama, where they had to adjust to the local labour market.

In the case of the six beneficiaries who completed senior-high school but decided to migrate with the intention of working, *Oportunidades* led them to delay their decision to migrate in order to stay in Tama and complete more years of education than non-beneficiaries, supporting the findings of previous long-term evaluations of the programme (de la Rocha, 2009; Rodriguez-Oreggia and Freije, 2012). However, *Oportunidades* did not influence their decisions to migrate, because their aspirations and decision-making processes were not influenced by higher levels of schooling nor a perception of the value of education; rather, they saw migration as the means to realise higher wages, urban adventure, independence or the things which other migrants had achieved. After completing their studies, these beneficiaries followed the destinations determined by Tama social networks.

Their trajectories reflected a variety of results that other evaluations have identified. For example, some were able to access better jobs due to their increased years of education (Yaschine, 2012). Others found jobs in the *taquerias* or as housemaids where, although their skills and education were welcome, they did not receive the benefits corresponding to their levels of education (de la Rocha, 2009). However, like Yaschine's (2012) results, they perceived that their wages were higher than in Tama, and some took advantage of their educational skills to find better opportunities in other labour markets. Therefore, in some cases the *taquerias* were the 'bridges' to other labour markets. Others decided to return to Tama, either landing better-paid jobs due to their higher education, joining their small family businesses, or having very little success and thus becoming construction workers. Therefore, their trajectories in Tama were influenced by the local labour market – a finding similar to those of de la Rocha (2009), Ibarra and Villa (2009) and Rodriguez-Oreggia and Freije (2012).

Finally, for the eight beneficiaries who dropped out of the programme, the influence of *Oportunidades* was not as strong as the factors that motivated them to abandon their studies and to migrate. They still completed slightly more years of education than non-beneficiaries, but they followed similar trajectories. However, those with greater number of years of education were able to access better jobs than those with fewer years at school and some invested their savings made in the USA to open a small business in Tama. The following case studies illustrate the different trajectories that beneficiaries of this study followed after *Oportunidades*, including the factors that affected their decision to migrate or not.

## 5.2 Aspirations shaping former beneficiaries' decision to migrate or not

I interviewed 27 beneficiaries from Tama, as shown in Chapter 3 (Methodology), Table 3.4. They were selected because they were part of the first cohort of *Oportunidades* beneficiaries during its first years of implementation (1998–2001). The following case studies were chosen because, from the first interview, I was able to identify particular aspects of their lives that could prove useful in unravelling the migration decision-making process and in illustrating the variety of trajectories that beneficiaries of my sample followed after *Oportunidades*.

### 5.2.1 Miguel: *'It was a 360-degree change because I used to be in a classroom with my pencil and my notebook, and suddenly I was collecting apples'*

Miguel, 28, is the fifth son of a family of six children whose main income was the international remittances from their father. I use the case of Miguel to illustrate the trajectories of beneficiaries who were exposed to both a tradition of international migration in their households and to the migration context of the *taquerias*. His father migrated to the USA when Miguel was nine years old, enabling the family to migrate internally from their hamlet to Tama town. This result echoes the findings of King *et al.* (2008) who have previously observed in Albania how the international migration of some members of the family financed the internal migration of the entire household to locations that offered more housing services and a better quality of life. Indeed, Miguel's father probably considered that, on his return, he preferred to relocate near to his home town, where he could invest his earnings or have greater opportunities for employment. King and Skeldon (2010) identified similar results in their theoretical models of return migrants' pathways, as did Skeldon (2006) in parts of China, Vietnam and India.

Since then, his father had returned and remigrated continuously. The main sources of income for Miguel's family were the international remittances sent by his father, *Oportunidades*, and the wages of his mother, who sold clothes in nearby towns or Oaxaca City. In his view, *Oportunidades* was not as useful as remittances, but his mother described how both incomes were beneficial and complemented each other:

*Oportunidades* helped us. Before, there was no support and people could only finish primary school. We began to live much better and to eat better ... it helped us with household expenses, food, what the children needed at school ... and of course my husband's money helped... He doesn't send a lot of money but it helps us ... and we have been using *Oportunidades* to buy food, vegetables, fruit, meat, better clothes and soap to wash them.

The case of this household is similar to other studies that have found positive complementarities between remittances and *Oportunidades* (Bañuelos, 2006; de la Rocha, 2009; Sanchiz, 2006). The money that Miguel's father sent was invested in building their house, while his mother allocated *Oportunidades* for its intended purpose.

Although his father was in the USA, Miguel did not feel affected by his absence. According to Sawyer (2014) in his study of the Mixteca region of Oaxaca, the gender of the parent who migrates has a significant impact on the educational aspirations of the children. In his study, children cared for by their mothers did not report any changes in their aspirations or were even more successful, suggesting that Miguel's life did not change radically and may even have improved as a result of *Oportunidades* and remittances. His mother wanted him to study and encouraged him to finish senior-high school:

Thanks to *Oportunidades* all my children finished senior high but now they have to see what are they going to do, they have to find their job themselves but I know they won't suffer like me or their father because they speak Spanish, they know maths, they know writing and reading, we don't know those things, that's why I told them to finish senior high.

Although his mother had low educational levels, she could positively influence the school aspirations of her children. The arrival of new schools in Tama and the support of *Oportunidades* led her to encourage her children to take advantage of the opportunities not available to her own generation. However, Miguel's parents had no experience of higher education institutions, which restricted their ability to guide him on the different university options. Indeed, their perception was that completing senior school was a sufficiently high achievement in itself. Therefore, as prior evidence suggests (e.g. Bok, 2010 in Australia; Young Lives, 2012 in India, Vietnam and Peru),

the number of school years that parents had completed impacted on their aspirations for a university education for their children and their ability to guide them.

Although his parents supported Miguel during his school years, the migration context of the *taquerias* encouraged him to work in one in Mexico City for six months after completing junior high. He saw his peers returning from the *taquerias* wearing new clothes and talking about the work and their lifestyles in other cities. His decision to migrate was driven by curiosity and a desire to make his own money, as prior studies on migration of Mexican youths have identified (Kandel and Massey, 2002; Tucker *et al.*, 2013). Although Miguel returned to study at senior high, he had already shaped an aspiration to work in the *taquerias*, especially after seeing the lifestyle of his *patrones*.

Once he finished senior-high, he thought about further studies but was unsure how to go about it. The closest universities were in Oaxaca City, where he had only been a few times and did not know anyone. Migrating to the USA became the more feasible option:

I went to experience what it feels like to be in the USA. Although that was not my plan I did it... I was thinking of studying but I didn't have the opportunity to continue because, first, Oaxaca, I knew it only a bit, I did not know where schools were, where to rent, more than anything ... you have to know at least someone to do something there, that's why ... maybe that's why I did not study further but crossed to the USA.

The day after his graduation, Miguel began his journey. With his father, godfather and brother, he crossed the Sasabe Desert to the state of Washington:

My dad invited me because he had been going and coming back from the USA since I was eight, and the *coyote* (people smuggler) was my godfather... I did not have any idea how to continue studying in further education or what was next. My dad never told me anything but 'Let's go to the United States'.

His family migration history influenced his trajectory after *Oportunidades*. Though his mother was making good use of both incomes, he migrated to the USA after senior high because his father and his godfather took the decision for him. Previous literature has shown that fathers with US migration experience encourage their sons to migrate (Cerutti and Massey, 2001; Tucker *et al.*, 2013). However, once Miguel arrived, his



aspirations were higher than working in the agricultural sector, where his father took him, as he was also influenced by the potential profits to be made in the *taquerias*:

I was taken to the fields and it was the worst thing that could have happened to me ... it was a 360-degree change because I used to be in a classroom with my pencil and my notebook, and suddenly I was collecting apples... I got tired and, after nine months, left that job, I told my father 'Here I can't do anything, I can't make money and I came here to make money, not to stay here always', so I moved to LA (Los Angeles), and I went back to what has always been my job, the *taqueria*...

In Los Angeles, he found a job in a *taqueria* and accommodation with help of his friends from Tama. With the money he was making he was able to build his house in Tama, something that made him proud. Miguel was certain that his migration experience increased his economic well-being and his goal became to open his own *taqueria*:

In the USA, I got the idea to open a business and not to study at all. Why study if I can make lots of money from this? A teacher, for example, is always at the same level and, as we say in Tama, 'A good *taquero* makes good money' so, with the money I earned, I thought 'I am going to start my own business', and I completely forgot about further studying.

As Bok (2010) has suggested, the decision to continue studying, or not, can be influenced by the perceived value of education as a path to obtaining better employment and social mobility. For Miguel, the means to obtain social mobility was not education. The way Miguel decided he could continue making progress in his life was through opening his own *taqueria*. The successful stories of his *patrones* influenced him. This might be explained by the fact that other people from similar backgrounds can modify 'mental models' or the aspirations and future-oriented behaviour of individuals (Bernard *et al.*, 2014). Indeed, aspirations can be framed based on the lives, ideals and achievements of 'similar' individuals in the 'aspiration window' (Genicot and Ray, 2009; Ray, 2006).

When he finished building his house, after five years in the USA, Miguel returned to Tama but with the ambition to migrate again somewhere else in Mexico. He moved to Guanajuato City where a neighbour offered him work. There, he met his wife and had a

baby. After getting to know more about the *taco* business, he finally decided to open his own *taqueria*, but the business did not go as well as he had expected. Perceiving his aspirations to have failed at destination, he decided to return to Tama.

Back in Tama he began to earn a living doing what his parents had taught him: weaving clothes or crafts to sell. After a while, with the help of his sister, he found a job at the local hospital. He considered this as a stable job because he received a regular income with some benefits. However, Miguel still hoped to migrate again and open his own *taqueria* in another city in Mexico. He wanted his daughter to inherit the business so that she would not have to worry about unemployment:

I will always have the aim to open a *taqueria* because, if you are good at it, you will live well... I want to tell my daughter ‘You know what? Why do you want to study that much if you can make money with my business?’, because now, even if you study, there are no jobs and you get frustrated ... that’s my aim, to open my *taqueria* and get rich.

Miguel’s migration experience made him aware that education did not always lead to social mobility. Indeed, he considered that people with an education do not get jobs easily – a common view in Tama. He was, instead, more inspired by the successful experiences of individuals from his locality – those of his *patrones*.

5.2.2 *Flor: ‘My father used to say to me “You are a woman and you are only useful to have children”’.*

Flor, 24, is the eldest daughter in a family with a history of domestic violence and where the mother migrated to support her children. I am looking at this case more closely because her account perfectly illustrates the role of gender norms and family responsibility in the decision to migrate, as well as the trajectory of female beneficiaries who migrated internally to work and who, once in the migration destination, formed or reinforced educational aspirations.

Flor was an *Oportunidades* beneficiary from primary school to the completion of senior-high school. She had two younger brothers. During her school years, her father had an alcohol addiction and her mother migrated to Mexico City to work as a housemaid and Flor was left in the care of her grandmother. She remembered that

*Oportunidades* had a positive impact on the household's income but also caused her father to be careless with money:

Sometimes we had economic problems ... but we could always get ahead ... with *Oportunidades* we received my share and my brother's and my mother also received something, so it was a great support. However, ... my dad felt we had a secure extra income ... sometimes, if he finished a job, all his time was spent drinking or sleeping. Even when he was working and getting an income, he preferred to spend it buying beers and my mother didn't say anything because she was scared of him... I think the programme made men lazy, as they know women nowadays work and also have *Oportunidades*.

Flor described her father's constant abuse of her mother. The large sums of money that Flor said that her mother was receiving might have challenged her father's view of traditional gender roles and emphasised his loss of status. This confirms the results of Bobonis *et al.* (2015), who observed an initial increase in male violence in *Oportunidades* beneficiary households, probably caused by the men's lesser control over household resources and decision-making. Similarly, Angelucci (2008) found that violence increased, in particular, in beneficiary households where the husband was an alcoholic and poorly educated, and where the wives received considerable benefits. Flor also narrated how her father began to reduce his working hours and spent part (or most) of his money on alcohol. According to Flor, her mother managed to escape this situation when she abandoned her husband and migrated to Mexico City. *Oportunidades*, said Flor, became the main source of income for her household, together with the money that her mother made from jobs in Tama or as a housemaid in the capital city.

The first time Flor migrated was to study at senior school in a neighbouring town. However, she then moved to the senior-high school in Tlahui, where her younger brother wanted to study. When she completed her school education she returned to Tama, unsure about what to do next. She recalls that, in that period, she became like a mother to her youngest sibling:

At that time, I was very confused, I did not know what to do, where to go, and then we had economic problems... I did not have much hope of continuing my studies, I got stuck without knowing where to go, what to do, who to talk to... I wanted to become independent and have my own money but I didn't

know how...my parents didn't tell me anything about why I was there, they never told me 'Look for a school or something' ... then I thought that I could probably work and study at the same time, but how? In Oaxaca, the salaries are very low, I saw that things were very difficult.

For Flor, the decision to continue studying or not was influenced by different factors. First, despite the efforts of her mother and the cash that she received from *Oportunidades*, the lack of income was the main barrier to her continuing to study. Second, higher education was unfamiliar to her as well as to other students from poor socio-economic backgrounds because universities are usually located in other cities and the students lacked the information necessary to qualify. Finally, families' lesser experience of higher education can be detrimental to the educational aspirations of their children (Ball and Vincent, 1998; Bok, 2010).

In addition, although her mother encouraged her to continue study, Flor always felt her younger brother was given more preference:

My mother used to motivate me a lot but ... she paid more attention to my brother ... and sometimes my dad used to say to me 'You are a woman and you are only useful to have children' and that in part ... I think it was good that he told me that ... his words had a great impact on me... because they motivated me to do better.

Her accounts illustrate how parental aspirations are often higher for boys than for girls (Dercon and Singh, 2013; Serneels and Dercon, 2014). Evidence from *Oportunidades* also shows that parents would give preference to the education of their sons instead of that of their daughters if they had to choose (Adato *et al.*, 2000). This is because parents believe that their daughters will get married and become housewives, while their sons will need to provide for their own households (Adato *et al.*, 2000; Lopez, 2005). However, this did not lead Flor to lower her own aspirations; it inspired her to try to achieve a better life. Tired of the situation at home, she moved, with the help of her cousin, to Guanajuato to work in a *taqueria*. Her parents (and especially her mother, who had previous migration experience) agreed to finance her trip. After a couple of months, Flor and her cousin moved to Guadalajara to work in another *taqueria* where her cousin had networks. In Guadalajara, Flor felt more stable and was able to start sending money to her parents, which made her feel proud. However, the manager of the

*taqueria* tried to abuse her and she ran away that same night. She called a woman she met one day in the *taqueria* who offered her work as a housemaid.

Throughout her account, Flor highlighted a feeling of family responsibility, as she was sending most of her income back to her household in Tama:

When I started to work there (in Guadalajara) I realised I was making more money than in Guanajuato and I thought ‘Now I am going to send them money’ while, in Guanajuato, I was feeling bad because I was, like, ‘How is it possible that I am working and I have no savings, that I am not even sending money?’. In Guadalajara I could start sending money. Then, when I was working as a housemaid I also sent money ... it was less, but better than nothing.

Flor’s narrative shows that young women’s decisions to migrate can be driven by a desire to achieve independence as well as by feelings of family responsibility (Mills, 1997). Likewise, her case suggests that she was also influenced by the migration context of the *taquerias* and her social networks, as suggested by the theoretical framework in Chapter 2. Although *Oportunidades* had made it possible for her to pursue an education, she migrated for other reasons.

Flor worked as a housemaid for eight months. In her neighbourhood, she took an interest in beauty treatments – something that she had never heard of until she saw the salons advertising them. She decided to return to Tama when a friend, who was about to migrate to the USA, recommended that Flor replace her as a secretary in a construction business. She worked there until she found a job as a supply teacher in another *Mixe* town. She did not like teaching and struggled to pay her expenses, so she decided to move to Mexico City, where she was living with her younger brother who was studying for a degree. She found a school where she could study to be a beautician and worked at a *taqueria* at the weekend to fund her studies. In contrast to Miguel, her experiences working in *taquerias* were an influential factor in her decision to continue studying because she did not want to end up like her female co-workers, with their low salaries, long working hours and no means of improving their situation.

After a year, she found a job at a beauty salon where she could make money and gain experience. All the jobs that she had performed had been in accordance with the employment stereotypes for women in Mexico (Garcia, 2007; Milicevic, 2010).

However, her migration experience in Mexico City made her feel more empowered because she was responsible for both her own and her brother's expenses as well as for funding her own technical education. Flor also felt that her hopes and dreams had changed since she had moved:

I realised that there are many options that I could not see in Tama. I was more close-minded as I had not been out of the town. When I left I realised that there are many options for continuing to study and to be independent – I became more open.

Like Miguel, Flor's perceptions illustrate that the migration experience in itself can impact on an increase in economic well-being and greater aspirations (Czaika and Vothknecht, 2014). Her networks formed at the *taquerias* increased her ability to migrate, and the migration experience itself increased both her awareness and her hopes for personal development, in turn reinforcing her decision to continue studying. Therefore, this shows aspirations are not static but continuously evolve over time (Tafere, 2014). By the time of the interview, she wanted to study English at a public university so that she could combine it with her Cosmetology degree. Although she spoke of her desire to return to work in Tama, she was also hesitating as she felt she had greater opportunities in Mexico City:

I feel I have more opportunities here. I can practice what I'm studying a bit more and I'm not, like, ... bogged down... I don't know what to do there (in Tama), where to go; I feel trapped, whereas here I feel like I'm more free, with more opportunities.

Her case illustrates the likelihood that increasing hopes and dreams are part of the reason why migration persists because aspirations become more achievable abroad (Carling, 2014). I continue my examination of the decision-making of beneficiaries regarding their aspirations to extend their stays abroad in the following case study.

### 5.2.3 *Mariel: 'I stopped thinking about studying or playing, I only started to think about how to get more money.'*

Mariel, 24, is the youngest of a large family of eleven whose children had engaged in both internal and international migration. Her profile illustrates the trajectory of female beneficiaries who dropped out school and migrated to the USA. Her father worked in

the construction sector and her mother sold craftwork and clothes in Tama. While Mariel studied, she remembered that *Oportunidades* had increased the wellbeing of the household:

We started to eat better, we already had bread at home, not always tortillas, and there were eggs and chicken, things that we didn't have before. We had milk, cheese, we were in a much better situation ... my mother could afford new pots. She started to buy buckets and dishes. We basically had food, school shoes and school materials. Before, my mother didn't give us anything like that.

Mariel's mother also noticed that the household's economic situation had improved and that *Oportunidades* now enabled her three beneficiary children to study:

I liked *Oportunidades*. Because of it, my younger children studied. My older children didn't receive it and it was very difficult because we didn't have money. My husband worked but he drank a lot and didn't give us any money.

As was the case for Flor, described earlier, *Oportunidades* negatively affected the gender dynamics in Mariel's household. Mariel felt that, although the situation of the household improved, the income was still not sufficient. She decided to migrate to Mexico City to work as a housemaid after she failed mathematics in senior-high school. This decision was influenced by her perception of herself as poor:

My parents didn't want me to leave but it was the desire to have some nice school shoes, to have what the girl who sat next to me had ... to be like them, because they dressed up, they had new school uniforms, something that I could not have. That was my idea. For my mother and father this was not important, but it was for me because I felt discriminated against at school – like 'the poor one' or 'the one who doesn't have' ... those were the ideas that sometimes made me think 'I'm leaving'. I stopped thinking about studying or playing, I only started to think about how to get more money and those things.

Working as a housemaid was not a pleasant experience and Mariel decided to return to Tama to finish senior high. However, when she was 16, she became pregnant and

dropped out for the final time. Things did not work out with her boyfriend and she ended up as a single mother. She found a job at a local savings bank, but she still did not earn enough money – which influenced her decision to migrate, according to her mother:

Mariel left because she had a daughter to support ... she started to work here but the salaries are very low, that's why she decided to go to the North. I wanted her to study but she didn't want to ... she wanted to build her house and wanted her daughter to study.

Mariel began to feel that her family was putting pressure on her, reproaching her for spending money with her new boyfriend instead of contributing more to the household expenses. Her boyfriend migrated to the USA while Mariel stayed in Tama. However, a family decision that favoured her brother over her made her consider migrating to the USA too:

We had a family reunion where it was decided who was going to keep the house and they said 'Well, Aron [her brother] has two daughters and is a single dad, and he won't have a place to live'. The house was his. I had given some money for that house but nobody said 'Mariel gave something' or anything, so I stayed quiet and thought 'Oh well, it's the decision of my parents and my siblings, I can't say anything, I'm the youngest' and they all thought of my brother before me, instead of saying 'Mariel is by herself and she is a woman' ... I got angry and started to get desperate and thought 'If my brother keeps the entire house, where am I going to live? What about my daughter?' I started to think that I needed to migrate to the USA.

Therefore, the parents' decision to support their sons instead of their daughters goes beyond education. The evidence from Mexico suggests that parents are more likely to pass on their resources – such as houses – to their sons rather than their daughters (Torche, 2015). Although Mariel and her brother were both single parents, her brother was living in Mexico City and had a higher income than her. Nevertheless, her parents did not favour her and her uncertain economic situation influenced her decision to migrate.

Her boyfriend encouraged her to join him in Washington State, so Mariel migrated, leaving her daughter in Tama with her mother. He paid for most of her trip, including



the smuggler's fee. She perceived migration as an investment in improving hers and her daughter's lives, both in the short-term and as a safeguard ensuring a better future for them both after her return. In an interview, her older sister suggested that it was not only increasing her income which influenced Mariel, but also the idea that building a house in Tama brings recognition:

She went because she said she wanted to work and ... the problem is that society here is very wrong ... everyone wants a house made of concrete and wants to have the best house or to accumulate things ... she left because she wanted to construct a house and ... she knows exactly why she left but here many people leave because they see that those who have been in the USA have more things, have built their houses – very big houses, made of concrete or brick. She wanted that.

Therefore, her decision to migrate was also influenced by the desire to achieve what others in the community had done in the USA. As Ray (2006) argues, aspirations are commonly framed by the lives, ideals and achievements of 'similar' individuals within the 'aspirations window'. In both of her migration experiences, Mariel was driven by a desire to have what others had. Her case illustrates the fact that, in Tama, as found elsewhere, the migration culture has a strong impact on aspirations (Ersanilli *et al.*, 2013; Garip and Asad, 2016; Kandel and Massey, 2002) including an influence of return migrants – showing the type of houses that they have built (Camfield *et al.*, 2012).

In Washington Mariel began to work in the fields with her boyfriend. After a year and a half they moved to Los Angeles when the weather conditions affected the availability of agricultural jobs. Their networks with people from Tama helped them to find jobs at a *taqueria* and a place to live. She tried sending money home every month to cover her daughter's expenses and the construction of her house. However, the money she sent was allocated to other household expenses, including those of her brother Aron's children and of her sister, who was studying for an undergraduate degree, as her mother explained:

I buy food, clothes, what her [Mariel's] daughter and her brother's daughters need at school because we share everything ... my other daughter is studying so I give her a bit sometimes because her studies are

expensive... Mariel sends me the money and I allocate it and spend it depending on what we all need.

This illustrates that remittances are fungible and that they are not treated as separate from other sources of family income (de Haas, 2006; Taylor, 1999). Indeed, although they are not spent directly on the specific investment that the migrant intended, they may free up other resources – such as *Oportunidades* – to be used in such investments (Castaldo, 2007). Mariel's mother received both incomes and, although she could not treat them as separate, she noticed that she could use *Oportunidades* for its intended purpose because Mariel's money was contributing to the expenses of the entire household. Therefore, the receipt of international remittances had a positive effect on the allocation and outcomes of *Oportunidades* in her household.

Mariel thought about returning to Mexico, as she felt that her daughter would need her more as she got older. However, her return was also related to her success (or failure) in realising her aspirations:

Sometimes I say to myself 'What am I doing, why did I leave?' If I'm the only person that my daughter has, I left her; it's a sorrow that I feel every day and it makes me think 'Why did I do this?'... Sometimes I think 'This is enough' and I feel like going back; it doesn't matter if people laugh at me or if they say 'She didn't achieve anything' ... but then I think 'What am I going to do (if I go back)? I still have nothing to offer her'.

Other research on Mexican migration has also pointed to the extended stays of young people in the USA until they have achieved both their goals (although financing a house has only been found in the case of males) and a tangible success from abroad in order to avoid family and social shame (Garip and Asad, 2016; Ravuri, 2014; Tucker *et al.*, 2013). Therefore, Mariel's story shows that it was not only migrants like Flor or Miguel (who succeeded in realising their dreams) who contemplated extending their stays. They, like Mariel, often preferred to extend their stays (or preferred not to return) until they had reached their goals and could show evidence of success back in Tama.

### **5.3 Factors shaping aspirations and the decision to migrate**

The above case studies have shown that, in a context such as Tama, international and internal migration can take place simultaneously (King and Skeldon, 2010; Skeldon,

2006). Indeed, they were useful in identifying general patterns in the factors related to the migration decision of beneficiaries and their life trajectories:

- the importance of socio-cultural norms;
- the household strategy for allocating the income from *Oportunidades*;
- the influence of family members; and
- the role of gender and family responsibility.

I analyse each of these in turn in the following section.

### 5.3.1 *Socio-cultural norms*

As migration increases in prevalence within a community, it modifies values and cultural perceptions in ways that increase the likelihood of future migration (Kandel and Massey, 2002; Massey *et al.*, 1993). However, as Garip and Asad (2016) point out, very few studies have considered the variety of social mechanisms that interact with and affect the social transmission of behaviour influencing the decision to migrate.

The aspirations of beneficiaries and non-beneficiaries in Tama are evidence that they are the result of social interactions and part of a system of ‘local ideas and beliefs’ (Appadurai, 2004). Three socio-cultural norms around migration affected their decision to migrate, although to differing degrees:

- the perception of success through labour migration to the *taquerias* or to the USA. Some beneficiaries gave up potential opportunities to continue studying after *Oportunidades* or dropped out of school before completing the programme;
- the perception of migration as a ‘rite of passage’ for males and as a path towards independence and the improvement of their personal situation for female beneficiaries; and
- the development of both a labour specialisation (Skeldon, 1990) and ‘institutionalised resources’ (Garip and Asad, 2016) (such as social networks that enable Tama migrants to work in the *taquerias* or migrate to the USA through local smuggling networks) that reduce the costs or risks of migration and increase its expected benefits. The development of this labour specialisation of Tama migrants to the *taquerias* is consistent with the early findings of Skeldon (1990), who observed the initial employment of rural migrants in certain professions who encouraged other home residents to work in the same occupation. Skeldon found that this process

facilitated internal migration in countries such as Peru, Papua New Guinea, and Indonesia because rural migrants gained access to urban jobs. This labour specialisation and ‘institutionalised resources’ have facilitated the labour migration of beneficiaries and non-beneficiaries alike, although beneficiaries who hoped to continue studying could make use of these networks to save for or finance their future studies.

First, the perception of success through labour migration encouraged participants to migrate to the *taquerias* or to the USA. This was illustrated by Miguel, whose image of success was related to the *patrones*. My case studies showed that beneficiaries migrated because they were attracted by the success of prior migrants and the accounts of returnees from urban destinations who unavoidably influenced the aspirations of those left behind. These findings support the results of other studies looking at the hopes and dreams of young people and migration (Camfield *et al.*, 2012; Carling *et al.*, 2013; de Haas, 2006). *Oportunidades* encouraged most of its beneficiaries to complete their studies, as shown in Table 5.1. However, other beneficiaries (such as the 23-year-old female return migrant from the US quoted below) abandoned school because they perceived that the returns on labour migration were higher than the returns on education:

I wanted to study but ... sometimes we young people, we get the idea of working, to make our own money and that, sometimes, is what ... is stronger, right? Is stronger and you don't continue [studies] and it is what happened to me, as I preferred to work at a *taqueria* in the city than to study, and then I wanted more and migrated to the USA.

After completing the *Oportunidades* programme, the decision to migrate for beneficiaries in this study was motivated by two different goals. Some aspired to migrate in order to continue studying, as they perceived education to be a traditional investment in human capital, although some combined labour and educational migration. Others wanted to migrate for work when the returns on education became less attractive. This loss of incentive was due to the outstanding economic success stories they heard about international migrants and the *patrones* – including their large contributions to the parties, which turned them into role models, as Chapter 4 indicated. Labour migration was seen as an accessible strategy for upward mobility, while the relationship between education and income weakened, as has been reported elsewhere

in Mexico (Halpern-Manners, 2011; Kandel and Massey, 2002; McKenzie and Rapoport, 2011). Tama people attribute a positive value to labour migration due to its high economic returns and, as demonstrated by the above case studies, encouragement from friends, family and society, who all motivated participants' decision to migrate.

Second, my case studies show that migration is linked to gender norms in Tama. For males, migration has an added social and normative component, making it a 'rite of passage'. Whether male participants migrated for labour or for educational purposes, they were influenced by the idea of migration as a path to adulthood and economic independence (see also Kandel and Massey, 2002; Massey *et al.*, 1994b; Tucker *et al.*, 2012). Some participants were eager to work in the *taquerias* or the USA in order to make their own money and experience living outside Tama. Other participants felt they had to achieve the same as their fathers, older siblings or other male peers. For females, however, their migration decision was interlinked more to the household than to the community (cf. Hondagneu-Sotelo, 1992; Kandel and Massey, 2002; Meza and Pederzini, 2009). This is a topic that I examine in more detail later in this chapter.

Third, the case studies showed that migrants relied on an already developed labour specialisation, especially in the *taquerias*. These specialisations are usually developed from apparently incidental initiations into a certain occupation at destination that later become 'self-reinforcing institutions' (Skeldon, 1990). The process of migration from Tama to different destinations continues through 'institutionalised resources' (Garip and Asad, 2016) such as the *taquerias*, the use of smugglers from Tama, and their extended network of friends and relatives abroad. For example, the *patrones* at the *taquerias* offered a job to any Tama migrant who asked for one, as confirmed by this 23-year-old male return migrant from Celaya:

If you get to a *taqueria* you will always get assistance ... Nobody says it but there is like an invisible norm that says that if you want to open a *taqueria* everyone has to be from Tama because you can't leave your *paisanos* [someone from the same place] behind... It is compulsory, that if you open a *taqueria*, your employees have to be from Tama.

This unwritten norm, which facilitates migration, also works for international migrants who hire smugglers who are natives of Tama because they have proved to be

trustworthy and experienced. Migrants relied on these trusted ‘institutions’, including their family and friends, who were often major factors in their migration decisions.

Therefore, these socio-cultural norms which I have identified interacted with each other and influenced the decision to migrate. Although *Oportunidades* did influence an increase in the education of most beneficiaries of this study (compared with non-beneficiaries) it did not impact on the further education aspirations of those who witnessed or valued the successes of previous labour migrants and who could make use of the extensive resources that facilitate labour migration in Tama.

### 5.3.2 Household strategies for allocating benefits from the *Oportunidades* programme

I now focus on the impact of *Oportunidades*’ income upon completion of the programme. Although my case studies illustrated that the households’ economic situations improved after the arrival of *Oportunidades*, the influence of the programme on the beneficiaries’ aspirations to continue studying or not and to migrate with this purpose depended on two interrelated factors: 1) whether *Oportunidades* was allocated for its intended purpose; and 2) whether beneficiaries felt that their income from *Oportunidades* had a positive impact on their own wellbeing.

For example, the cases of Flor and Mariel showed that the extra income had unintended effects on the head of household, who sometimes reduced his working hours or began to spend the money on his own needs instead of contributing to household expenses. In these cases, the impact of *Oportunidades* was reduced because it became the main rather than a complementary income and affected beneficiaries’ perceptions of living in poverty.

In other cases, the income from *Oportunidades* was not only allocated for the needs of the beneficiary, but for the needs of the entire household. The literature on social protection has identified that cash transfers can be fungible – or that a unit of cash from one source of income is equivalent to another unit of cash of the same amount from another source of income (Devereux, 2000; Hagen-Zanker and Himmelstine, 2015; Maitra and Ray, 2006). Although *Oportunidades* was designed to be spent on certain investments for particular members, the cash was not necessarily used in those ways and was treated as one more source of income for the immediate needs of the household, as this female beneficiary, 27 years old, a return migrant from the USA who dropped out of school illustrated:

My mother never agreed with my leaving [for the USA] ... she mentioned to me that she was going to lose that support [*Oportunidades*] ... it was a great support for them, for my siblings who were at university, because we did not use it for us, maybe a little bit, but it was more to help my siblings who were at university.

In these cases, *Oportunidades* financed and made migration possible for older siblings studying abroad. However, it reduced the impact of the programme on the intended beneficiary back home. Most beneficiaries had between six and eleven siblings with whom they shared the programme, showing that cash transfers are fungible, especially at low levels of income where the cash is distributed among competing priorities, as Devereux (2000) shows in the case of Mozambique. *Oportunidades* did not influence the migration decision of these beneficiaries, such as Mariel, because they felt poor and migrated to improve their own situation instead of staying to further their education at home. Therefore, how the money was spent, and whether the beneficiary perceived an improvement in their own situation, influenced their perceptions of poverty and improvements in their own wellbeing which, in turn, influenced their aspirations for the future and the reasons behind their migration decision.

The allocation of resources was different for households with higher incomes; in Tama, they were invariably those that received remittances from the USA. In these cases, *Oportunidades* supplemented the main income and was used for its intended purpose, as the case of Miguel showed. Similarly, other mothers receiving both *Oportunidades* and international remittances described how the two incomes allowed them to use *Oportunidades* for its intended educational, health and nutritional purposes. Meanwhile, remittances could be saved or allocated for greater expenses such as building houses, donating prizes, hosting the musicians or investing in agriculture. These findings confirm the NELM theory that migration decisions are part of family strategies to increase income, invest in new activities and protect against risks (Taylor, 1999).

However, beneficiaries such as Miguel, in households receiving international remittances, did not typically continue studying in higher education; some dropped out to reunite with their migrant parents. Therefore, a household economy improved by a combination of remittances and *Oportunidades* did not necessarily lead to an increase in the educational aspirations of the beneficiaries of this study. Meza and Pederzini (2009)

similarly found that exposure to the idea of migration at the household level had a negative influence on the school attendance of *Oportunidades* beneficiaries.

Hence, other factors (such as the allocation of *Oportunidades*, whether beneficiaries benefited directly from the cash or not, and whether *Oportunidades* was complemented with other incomes) all influenced the impact of the cash on the wellbeing of beneficiaries and their aspirations to continue studying (or not).

### 5.3.3 *The influence of family members*

The third factor identified as influencing beneficiaries' decision to migrate was the role of other family members.

Parents had a strong influence on whether or not beneficiaries completed the *Oportunidades* programme. The majority of mothers I interviewed highlighted the importance they accorded to education and their hopes that their children could profit from *Oportunidades*. Parents encouraged their offspring to make the most of the new opportunities, including higher school levels and the benefits of the programme, which were not available when they themselves were children. However, my case studies also showed that the low school levels of parental education had an impact on whether or not they hoped or expected that their children would attend university, and on their capacity to guide them through the various educational options. Likewise, some parents did not discourage beneficiaries from continuing to study but highlighted their economic inability to support their children in their educational aspirations. This has been a recurrent barrier observed in the literature on aspirations in Latin America (e.g. Crivello, 2011; Pasquier-Doumer and Risso, 2013). In these cases, Tama beneficiaries often developed a sense of educational failure from an early age and labour migration was contemplated as the means by which to achieve social mobility.

Parents had an impact not only on the effects that *Oportunidades* had on the beneficiaries, but also on the migration decision-making and the trajectories that their children followed. The case of Miguel illustrated that network theory plays an important role in understanding Tama, since one aspect of it is that migration behaviour is transmitted from fathers to sons (Cerutti and Massey, 2001; Massey *et al.*, 1993). Indeed, Miguel started doing the same job as his father in the USA and, once he returned to Tama, he began to do the same job that his parents had taught him. The evidence in Mexico suggests that the occupation of the parents is the second most



important factor, after education, in the occupational achievement of beneficiaries (Yaschine, 2015), suggesting that, although *Oportunidades* furthered beneficiaries' education, the latter could also take over or participate in their parent's occupations. Parents also influenced the decision not to migrate. In the case of two of the three female beneficiaries who stayed in Tama, one remained because her mother offered her work in the family business, while the other took over her father's position as teacher.

Other family members like older siblings or cousins also played a role in the migration decision-making process. Beneficiaries who continued studying highlighted the role of their educated older siblings in motivating them and guiding them through their studies. Other beneficiaries were encouraged by their cousins or siblings to join them in the *taquerias* or in the USA, demonstrating the effects that other family members had on both the outcome of *Oportunidades* and the decision to migrate – an influence which sometimes did not support the intended outcomes of the programme.

In the case of non-beneficiaries, family members also affected their decision to migrate and their labour outcomes, as their households had neither the resources nor the incentives to keep them in school. On the contrary, these families were more likely to steer their children into early labour migration, usually after completing primary school. In other cases, non-beneficiaries did not receive *Oportunidades* because their parents migrated and the children preferred to abandon school at an early age to start working or to reunite with their parents, as in the following example of a 22-year-old male migrant to the US:

I wanted to see my parents because they were here (in the USA) and I missed them after six years... they influenced me... they told me that here I would have more opportunities and I would make more money than in the *taquerias* and, after listening to their stories of how their life was here, I deluded myself.

Therefore, when comparing beneficiaries and non-beneficiaries, both were strongly influenced by their parents or other family members in their decisions to migrate and the pathways they would follow. These kinship networks are the channels of knowledge and support that, in turn, influence migration decisions (Boyd, 1989; Garip and Asad, 2016). However, beneficiaries achieved more years of education and migrated later

because *Oportunidades* influenced their parents' attitudes towards education and the cash they received acted as an incentive.

#### 5.3.4 Gender and family responsibility

Both female beneficiaries and non-beneficiaries in Tama took decisions according to what they thought was expected of them as women, to their position in the household, and to their perceived family responsibilities. Of the eight beneficiaries who dropped out from or interrupted their studies, six were women and their motives for so doing reflected these factors.

However, in the case of female beneficiaries, four differences with female non-beneficiaries were repeatedly mentioned. First, non-beneficiaries had to work after school, investing more time in domestic duties than in their education. These duties included looking after younger siblings, cooking, cleaning, working on the family plot and collecting firewood. Studies in Mexico have shown that women are usually more involved in household chores, with help of their daughters, because one day the latter will be responsible for their own households (Garcia, 2007; Milicevic, 2010). Although female beneficiaries also had to undertake these duties, they admitted to spending less time in such activities. The economic support from *Oportunidades* and their parents' (especially their mothers') greater perception of the value of education increased the incentive for their families to reduce the time which beneficiaries spent on household duties (see also Adato *et al.*, 2000; Maldonado *et al.*, 2005; Skoufias and Parker, 2001).

Second, female beneficiaries were less affected by gender norms surrounding women's ability to study while they were in Tama. Their parents supported their education due to the higher amounts of cash that girls received as they progressed to higher grades. Most female beneficiaries felt that their parents cared about their education because it would lead them to have better lives than those which they themselves had had. As a result, the female beneficiaries in my study completed, overall, more years of education compared with non-beneficiaries. Aurora, a non-beneficiary, noticed the change that *Oportunidades* brought about in her own household:

My parents grew up thinking that women's duties were only in the kitchen, or looking after the younger siblings, and that women were only fit to have children, but now things have changed... My oldest sister didn't go to school, not even one day, the sisters behind her went to primary school but

we had to work in the fields after school as well, it was our duty... I think my mother changed her way of thinking because *Oportunidades* arrived and women had to attend talks and they were told that girls had to go to school... The youngest of my sisters received *Oportunidades*. For her things changed and she is now studying.

Third, female non-beneficiaries had to migrate at an earlier age in order to contribute to their households' income. Previous studies have observed that the decision of young women to migrate was influenced by what they perceived to be their duty towards younger siblings or their households (Kanaiaupuni, 2000; Mills, 1997; Sandoval, 2016). However, for beneficiaries, the extra income from *Oportunidades* reduced the need to oblige daughters to migrate. For non-beneficiaries, the situation was different. Aurora went on to describe the circumstances under which she migrated after primary school to work as a housemaid:

I was brought by my sister. She brought me up because we had to help. It was not about working only for myself, we had to send money to my parents. I worked for four years, sending all my income to them; my salary was collected by my sister. All we had in that house was food and shelter... I didn't want to come. We were very poor in my house, that's why I left, to make more money... I stayed in that house for two years but I suffered; even if they paid me well I didn't know how to stand up for myself.

Fourth, and as a result of the previous factor, female beneficiaries said that they had more independence in their decision to migrate than non-beneficiaries, whose families intervened more or decided on their behalf. Although some beneficiaries continued supporting their households, they also migrated to continue studying, to pursue a better life, and to find better opportunities outside Tama. They did not follow the conventional gender roles of migrating as daughters or wives (e.g. Cerutti and Massey, 2001; Hondagneu-Sotelo, 1992). Although their female networks led them to undertake gendered employment, for example as housemaids or in the *taquerias*, they could usually improve their situation and find other jobs more suitable to their skills.

Nevertheless, although *Oportunidades* influenced the decision of most female beneficiaries to remain in Tama to complete their studies instead of migrating, this was not always the case. A few beneficiaries also had to migrate to contribute to their

households' income because they felt that this was their duty as daughters. Others, as mentioned, considered the economic benefits of migration to be greater than those of education, while others fell pregnant. Mariel became a single mother, leading her to migrate to make more money for her child. Other beneficiaries migrated for economic reasons as well as to reunite with partners who migrated earlier to the USA. These cases illustrate that there are situations in the lives or in the households of female beneficiaries that can reduce the likelihood of their completing the *Oportunidades* programme and favouring migration, especially for those in their senior-high-school years (see also Meza and Pederzini, 2009).

Furthermore, some beneficiaries faced gender norms once they had completed *Oportunidades*. Flor illustrated that parents, although they valued their daughters' education, also tended to favour that of their sons if they had to choose, as Adato *et al.*, (2000) have also observed for beneficiary parents elsewhere in Mexico. Flor's case also showed that norms associated with the role of older daughters as economic contributors to their households or as caregivers if they remain can affect decisions to migrate after *Oportunidades*. Other female beneficiaries decided not to migrate in order to support their sick parents in Tama, their family's small business or to start their own family. These examples of kinship and care are important factors influencing the decision to migrate or to stay put (Kanaiaupini, 2000; Sandoval, 2016), including the trajectories of female beneficiaries. Expectations of what it means to be a good wife or a good daughter or sister influence the migration decisions of female beneficiaries in addition to their own aspirations to realise a better life.

#### **5.4 Aspirations of current beneficiaries and their decision to stay or to migrate**

After having examined the influence of *Oportunidades* on former beneficiaries, this section will look at the aspirations and the migration decision of current beneficiaries in Tama and its hamlet, Lindavista. The evidence presented is the result of the focus-group discussions held with beneficiaries in both localities in their third year of junior-high school (14–15 years old) and, in the case of Tama, in their third year of senior-high school (17–18 years old). As mentioned in Chapter 4, junior-high schools in Lindavista are taught by one teacher for each grade and belong to the *telesecundaria* system (junior-high school education delivered by satellite TV to students in rural areas). Likewise, the hamlets do not have senior-high schools, therefore young people have to migrate if they wish to continue studying.

As stated in the methodology, in order to explore the aspirations of participants, I employed the approaches of Camfield (2006) and Copestake and Camfield (2010) on perceptions of well-being. Participants were asked to imagine a person (a boy or a girl) who was five years older and who had a ‘good life’, visualising his or her personal characteristics and surroundings. Afterwards, the opposite was asked – that they visualise a person five years older who did not have a good life, neither in his or her personal characteristics nor surroundings. This was followed by a discussion of what each idealised person would have needed to have done, if he or she was from the locality of the participant, in order to achieve their imagined future.

**Table 5.2 Aspirations of beneficiaries in Tama and Lindavista (%)**

		<b>Tama town</b>	<b>Lindavista (Tama)</b>
Type of aspiration	<ul style="list-style-type: none"> <li>• Further education</li> <li>• Find paid work</li> <li>• Unsure</li> </ul>	70 15 13	18 81 0
Goals that would be fulfilled through the aspirations listed above		<ul style="list-style-type: none"> <li>• To become someone in life</li> <li>• To have a better life</li> <li>• Not to be like my parents</li> <li>• To make my parents proud</li> <li>• Because I don't feel like studying</li> <li>• To be a good example for my younger siblings</li> <li>• To save money so I can study university</li> <li>• Because I want to have my own money and my own house</li> <li>• To support my family</li> <li>• Because I want to look after my siblings</li> <li>• Because There is no money and I need to work</li> </ul>	<ul style="list-style-type: none"> <li>• Because I have to start looking after my siblings</li> <li>• I want to get money to support my family</li> <li>• Because there is no money and I have to work</li> <li>• Because I need money if I want to study</li> <li>• Because I don't like studying</li> <li>• Because I don't like living in my house anymore. I want to work and have my own money</li> <li>• To work, get married and have children</li> <li>• Because I want to work in a restaurant</li> <li>• To look after my family and finishing constructing the house</li> </ul>
Educational aspirations	Junior-high school Senior-high school Technical/teacher-training college Undergraduate Postgraduate Unknown	2 4 13 25 32 21	54 18 0 9 0 18
Professions aspired to		Engineer, doctor, teacher, lawyer, architect, nurse, pedagogy, informatics	Doctor, architect, teacher, working in a restaurant, housewife
Parents' approval to continue studying	Strongly agree More or less agree Somewhat agree No agreement	60 32 8 0	45 27 0 28 (only mentioned by girls whose parents wanted them to work and support their household)
Migration destinations aspired to		Mexico City, Oaxaca City, USA, Celaya	Mexico City, Oaxaca City, Irapuato, Celaya, Lindavista
Perceived barriers		Lack of money; lack of parental support	Lack of money to continue studies; nothing "I have all that I need"

*Source:* own elaboration of data from questionnaire

Dreams of having *lo básico* (the basics) such as health, food and work were mentioned in both localities. Likewise, participants in each place were influenced by the migration context to the *taquerias* and the USA, describing the qualities of life of a person who lived well as having material goods such as cars, big houses and money. Therefore, the migration context of Tama town extended to Lindavista. However, the focus groups revealed differences, at each locality, in the aspirations of beneficiaries, the motives for their decision to migrate and the role of *Oportunidades*. This finding was confirmed by the questionnaire data, which revealed that a greater proportion of beneficiaries in Tama hoped to achieve higher grades of education and to migrate to continue studying, while most beneficiaries in Lindavista just wanted to complete junior-high school and to migrate to work (see Table 5.2). I will analyse these discrepancies in the following discussion.

#### 5.4.1 Tama

The aspirations and their shaping of Tama beneficiaries reflected those of former beneficiaries, therefore I will not go through them in detail. Overall, the evidence in Tama suggested that most beneficiaries identified educational migration as the means to achieve their personal goals. However, the importance of education was competing with thoughts of labour migration, influenced by the image and lifestyles of migrants and ideas of relative deprivation, as the theoretical framework suggested. These factors were more evident in Lindavista, where the poverty levels were higher than in Tama, and where young people have to decide after junior-high school whether they want to migrate or not.

#### 5.4.2 Lindavista

As mentioned in Chapter 3, only female beneficiaries participated in the focus group. No males volunteered to take part, probably due to a lack of interest in the topic or to my presence as a woman whom they did not know. However, this particular focus group enabled me to examine gender norms and female aspirations in a context of higher poverty in more detail.

When discussing the characteristics of someone who lives well, females in Lindavista on the one hand aspired towards material wealth that was difficult to achieve, at least in within five years – such as luxuries, houses and large amounts of money. On the other hand, they also mentioned items that they already had, such as a bed, or activities in

which they already took part in their everyday lives – watching soap operas or working in the fields. The most likely explanation for this is that females in Lindavista were influenced by the lifestyles and experiences of other similar females. While some dreamed simply of attaining that which they observed within their context and believed that they did not need more (e.g. growing coffee, raising cattle, watching soap operas), others hoped for the material wealth and items attained by their female migrant peers.

Whether they were experiencing either a very wide or a very narrow aspiration gap (the standard of living that an individual hoped for compared to that which he or she actually had), both cases could be detrimental to their hopes and dreams. When the aspiration gap is very wide, this could lead to feelings of failure to achieve (Camfield, 2006; Camfield *et al.*, 2012; Ray, 2006). Conversely, when individuals (intentionally or unintentionally) prefer to limit their ambitions to what they believe is attainable, they could be suffering from ‘adaptation’ (Camfield *et al.*, 2012). Therefore, the aspirations of female beneficiaries in Lindavista reflected a ‘co-existence of a culture of aspirations, where goals exceed resources, with a culture of poverty, where people have stopped pursuing what they cannot achieve’, as Camfield *et al.* (2012: 1067) observed in their study of young females in rural localities in Thailand who were also influenced by high migration to urban localities.

As in Tama, migration was considered by most females in Lindavista as the means by which to achieve their goals. The decision to migrate was influenced not only by their perceived responsibility to contribute financially to the household, but also by their desire for specific material goals and status, as attained by their female migrant peers. Female internal migrants returned home showing off the items they had bought and the lifestyles that they had achieved in their migration destinations, influencing the aspirations of the girls who remained behind, as one teacher observed:

The party of the town is in April... that month, those who return, they wear their best clothes ... girls that leave to work come back wearing high heels – yes, coming down that mountain! – with boots and make up, then the others see that and are influenced by it and say ‘I am here and I am wearing sandals not boots and when I leave I will also come back showing off’. After the party two of my students who dropped out are coming back and the others are already saying ‘Let’s ask them how it is going, they must have a good mobile phone now’.

Participants in Lindavista (males and females) showed a clear preference for starting working and migrating after finishing junior-high school (see Table 5.2) because those who returned were bringing home an image of the opportunities in their current places of residence and of the standards of living achievable there. According to their teacher, a higher number of students dropped out because they preferred to migrate to work than to complete their junior-high school education. Therefore, only a minority of girls planned to continue studying or to remain in Lindavista. These different aspirations emerged during the focus group:

*Miriam:* When I finish junior-high, I am not going to continue studying any more. I am going to work in ... I still don't know where... Celaya, or also I would like to go to the United States ... but when I return here ... I am going to build my house, live better and then get married...

*Mariana:* I am not going to study any more, I am going to look after my little siblings ... one is already 15, another is five and the third will be born in the following months ... that's why I won't study, I will stay here to look after them.

*Andrea:* I don't like working. I prefer studying than working and, at our age, we can't even work [legally]...

*Gabriela:* That's not true; some, when they finish junior-high, they look for work and get accepted, even if they don't have any senior-high school education ... I want to start making money because ... when we study ... some people do not eat or some people get ill and they have to study and do not make money, but if they work they are given food and they also make money...

The above examples clearly illustrate the reasons behind the young people's educational or labour aspirations, as well as their desire either to migrate or to stay home. Migration was the means by which to acquire the material items, personal autonomy and economic independence to which they aspired. These aspirations went hand-in-hand with their economic family responsibilities, echoing the findings of Camfield *et al.* (2012) and Mills (1997), whose research concerned young females in Thailand. Although some young girls in Tama also shared these aspirations, those in Lindavista decided to migrate to work at a younger age because the needs of their families were greater. To continue studying involved additional costs much higher than the value of



*Oportunidades*, partly because they would have to migrate to other localities to study at senior-high and because being a student involved more costs for their households instead of income. Therefore, their dreams of continued study would worsen rather than improve their economic situation.

Females who planned to stay in Lindavista were actually driven by family obligations and culturally expected duties. They described how they had to help with the household chores or look after their younger siblings, illustrating the perceived gender norms that prevail in Mexican society (Hondagneu-Sotelo, 1992). Therefore, female beneficiaries, regardless of whether they felt that they had to stay or to migrate, were influenced by ideas of gender and the cultural values of what a good daughter had to do to contribute to the household. In Tama, most female beneficiaries were only affected by these norms later, once they had already completed senior-high school. However, in Lindavista, most females mentioned their wish to start their own family in the following five years. This is probably because their educational options were limited and having a partner and children at an early age was a status symbol, with a shared ideal of traditional women as housewives who take care of their husbands and children. Therefore, the timing of migration that females were probably contemplating was either temporary or migrating to follow their future husbands.

A final factor influencing the aspirations of beneficiaries in Lindavista were the parents, whose levels of education were lower than in Tama, as Chapter 4 showed. All those participants with neither the support nor the approval of their parents to continue studying were female. In the questionnaire, more females than males reported that the wishes of their parents were for their older offspring to look after their younger siblings, to make money for the household, or to finish the construction of the family house. This result illustrates the influence of perceived economic or caring family responsibilities at an earlier age than in Tama. As a result, a majority of girls from Lindavista, compared with those in Tama, significantly reduce their school enrolment after junior-high, as Chapter 4 (and Table 4.14) demonstrated.

For both males and females, network ties at migration destinations, an obligation to complete any house investment that their parents had started or to support their households economically, reinforced by strong patriarchal gender norms, all influenced their decision to leave school at a younger age than in Tama and to migrate, as one third-year senior-high school teacher confirmed in 2014:

I have students – boys and girls – whose parents are in the USA and they send money to construct a house, but the house is incomplete; it needs the finishing touches. So the student tells me ‘I am leaving, teacher, because I have to finish the house, this is how we do it: the parents start it and the children finish it’. ... Others, their parents are construction workers and they are in Oaxaca City so my students think ‘He is going to find me a job, so I am going with him’. They don’t want to study, they are not interested in having a profession.

Thus, in Lindavista, compared to Tama, factors such as the need for economic resources in order to continue studying and the necessity to migrate for this purpose, the migration context, and the stronger requirements of family economic responsibility were more significant for the decision to migrate than the influence of *Oportunidades*, and its role in increasing young people’s aspirations to continue studying. Therefore, the intended effects of *Oportunidades* can be reduced by geographical location, and the resulting lack of schools, increased poverty and low levels of parental education.

## 5.5 Summary

This chapter has provided an examination of the influence of *Oportunidades* on the decision to migrate of former beneficiaries from Tama, and of other factors that played an important role upon their completion of the programme.

Overall, I have argued that *Oportunidades* influenced the decision to migrate when it contributed to increasing the educational aspirations of former beneficiaries and their levels of education. However, in a context of high labour migration such as Tama, the decision to migrate for educational or labour purposes after *Oportunidades* was divided according to what former beneficiaries perceived to be a means to social mobility and their ability to migrate. My case studies supported the following observations:

First, *Oportunidades* had the strongest influence on the decision to migrate when it was allocated properly, former beneficiaries felt that their own situation improved and, as a result, their hope of continuing their studies increased which, in turn, influenced their decision to migrate for education rather than work in low-skill jobs, mainly the *taquerias*. Second, *Oportunidades* led to former beneficiaries delaying their decision to migrate until after they had completed their senior-high education, at which point they migrated to work, rather than to study. However, it did not influence whether or not they chose to migrate in the first place; they migrated due to factors over which

*Oportunidades* had no control, such as household or social expectations. Third, *Oportunidades* had no influence on the decision to migrate of former beneficiaries who dropped out of the programme.

The combined effect of factors at the household level, the migration context and social expectations affected the way in which *Oportunidades* influenced the decision to migrate, what former beneficiaries valued and the trajectories that they followed.

After having examined the decision to migrate and the life trajectories of former beneficiaries, the chapter has analysed the aspirations and migration decisions of current beneficiaries from Tama and Lindavista, focusing on females in the case of the latter. The findings from Lindavista supported the notion that the influence of *Oportunidades* on the beneficiaries and their decision to migrate is very dependent on the context of the different localities. In Lindavista, factors such as the migration context, the geographical location and the resulting higher levels of poverty and lack of a senior-high school reduced the influence of *Oportunidades* on shaping educational aspirations. These factors were more influential on the decision to migrate for work and at a younger age.

The next chapter is also devoted to the relationship between *Oportunidades* and migration, this time in the context of Tlahui.

# 6

## **Tlahui: The decision to migrate, the influence of *Oportunidades* and the life trajectories of former beneficiaries**

In this chapter, I present empirical evidence on the decision to migrate of former beneficiaries from Tlahui (including the trajectories that they followed after *Oportunidades*) before examining the decisions of current beneficiaries. In the first part of this chapter, I give a general overview of my sample, comparing the trajectories of former beneficiaries and non-beneficiaries, and looking at the influence that *Oportunidades* had on their aspirations and migration decision. I then present three case studies of former beneficiaries who did migrate. In the third section, I examine the contextual factors that influenced the aspirations and migration decision-making of these and other former beneficiaries in Tlahui. These factors were similar to those found in Tama, but had different meanings and affected individuals in other ways. Finally, after analysing the aspirations of and the influence of *Oportunidades* on former beneficiaries, I examine the decision to migrate of current beneficiaries of Tlahui and Tejas.

I argue that most former beneficiaries in Tlahui had educational aspirations, and that *Oportunidades* was therefore able to provide the funds to support them and made their education possible. Migration was perceived as a way to fulfil educational and other personal hopes and dreams although, as we will see, migrants' plans and aspirations sometimes changed once at the migration destination.

As for current beneficiaries, I argue that those in Tlahui also had strong aspirations to continue studying and to migrate. In Tejas, the transmission of socio-cultural norms (including the value of education) from Tlahui to Tejas has influenced some beneficiaries' desire to continue studying, including the possibility to continue studying in nearby senior-high schools. However, the influence of *Oportunidades* was more

limited in fulfilling the educational aspirations of beneficiaries in Tejas because, as in Lindavista, they perceived that their household expenses and the costs of their education were higher than the value of *Oportunidades*. Like beneficiaries in Lindavista, those in Tejas reported more barriers to the achievement of their educational aspirations – such as the cost of migration for their households, the lack of support by some parents and the need for the students to contribute to the economic expenses of their household after completing junior-high school. Therefore, the sociocultural norms of the towns can be transmitted to the hamlets, but the barriers to the attainment of their goals are higher.

### **6.1 The influence (or not) of *Oportunidades* on the decision to migrate**

In the following sections, I examine the aspirations and the decision to migrate of former beneficiaries – henceforth ‘beneficiaries’, in order to facilitate the reading of my findings. Table 6.1 provides a summary of the influence of *Oportunidades* on beneficiaries’ decision on whether or not to migrate. It includes the level of education that beneficiaries achieved compared with that of non-beneficiaries.

In the case of beneficiaries, a majority completed senior-high school: out of 19, only two abandoned their studies at this level and migrated for reasons that I explore later in the chapter. Most beneficiaries already had educational aspirations, due to the importance that Tlahui, their relatives and their teachers all accord to education. For these beneficiaries, *Oportunidades* contributed to the fulfilment of their existing aspirations to continue in senior-high school and to migrate on completing their education.

Of the 17 beneficiaries who completed senior-high, 14 were determined to continue studying. Eleven migrated to achieve this goal, while three continued studying in Tlahui because they either lacked the economic resources to migrate or had started a family. The fact that Tlahui has two institutions of higher education reduces the economic constraints for students who aspire to continue studying and to the shaping of educational aspirations from an early age, as children can see that there are attainable educational opportunities. However, most beneficiaries migrated to continue studying, indicating that they had additional aspirations that were not achievable at home. However, for some, their aspirations changed once they reached their destination. Some began working to fund their studies but abandoned their educational aspirations when they began to make their own money. Others dropped out of university due to a lack of

interest or to economic constraints, while others found higher education abroad too difficult or too expensive and returned to study in Tlahui. This evidence supports the observation that aspirations are not static (Tafere, 2014) and can change once at destination.

**Table 6.1 Summary of beneficiaries' and non-beneficiaries' levels of education and migration decision, and the influence of *Oportunidades***

Beneficiaries					Non-beneficiaries			
Level of education achieved	Total	Migration decision	Total	<i>Oportunidades'</i> influence on education and migration decision	Level of education achieved	Total	Migration decision	Total
Senior-high school completed	17	Migrated to study in Mexico	11	Enabled completion of senior-high; supported aspirations to continue studying and migrate	Senior-high school completed	4	Migrated to continue studies in Mexico	4
		Migrated to work in Mexico; returned to study in Tlahui	2	Enabled completion of senior-high; supported aspirations to continue studying but no influence on migration decision				
		Migrated to work in Mexico	2	Enabled completion of senior-high; no influence on decision to migrate				
		No migration; continued studies in Tlahui	1	Enabled completion of senior-high; supported aspirations to continue studying but no influence on migration decision				
		No migration	1	Enabled completion of senior-high; no influence on decision to migrate				
Dropped out of senior-high	2	Migrated to work in Mexico	2	Enabled some years of senior-high; no influence on decision to migrate	Dropped out of senior-high	1	Migrated to work in Mexico	1
Total	19				Junior-high school completed	1	Migrated to work in Mexico	1
					Total	6		

Three beneficiaries completed senior-high but did not attempt to pursue higher education because they perceived their lack of economic resources to be their main barrier. However, they were also influenced by other factors such as the stories of peers and relatives in the city or norms related to gender roles and social expectations, as in

Tama and as illustrated by one of the case studies. For these beneficiaries, *Oportunidades* contributed to their completion of senior-high school but did not influence their decision to migrate.

The trajectories of beneficiaries who migrated and joined the labour market support the findings of other evaluations of *Oportunidades*. Some migrants benefited from their greater levels of education and found stable jobs (e.g. see Parker and Gandini, 2009; Yaschine, 2012), using their academic and social skills to work as waitresses, cashiers, musicians or sales assistants in small businesses. In contrast, other beneficiaries found jobs through their social networks (such as housemaids or construction workers) that did not necessarily corresponded to their level of schooling, as previously observed by de la Rocha (2009). However, their higher education and skills contributed to their ability to bargain for better salaries, or to use their jobs as stepping-stones to better employment. Others were able to improve the economic situation and social mobility of their households. Those in the least-favourable position were beneficiaries who had dropped out of school or non-beneficiaries with lower levels of education who were working in precarious situations with no benefits and very low salaries.

Compared to Tama, three main differences are important to highlight.

- First, my sample shows that educational aspirations and school achievement were higher in Tlahui, confirming the data presented in Table 4.14. In Tlahui, fewer of my participants abandoned their education and a majority of non-beneficiaries completed senior-high and migrated to continue studying, confirming that educational aspirations were already present.
- Second, although some beneficiaries mentioned having relatives in the USA, none of them had international migration experience. Of those who had, most had migrated either to Mexico City or to Oaxaca City, confirming the data in Figure 4.8 and Table 4.6.
- Third, no female beneficiaries abandoned school due to labour migration aspirations or pregnancy. However, in some cases their post-*Oportunidades* decisions were influenced by traditional gender norms and expectations for women. The trajectories described in this sample will be illustrated by three case studies that begin to unravel the decision to migrate of beneficiaries in Tlahui and the factors that shaped their aspirations.

## 6.2 Aspirations shaping former beneficiaries' decision to migrate or not

As in Tama, from the 19 beneficiaries, I selected three case studies that, while not entirely representative of the trajectories of beneficiaries, nonetheless give insights into the general trends in migration decisions and the trajectories followed by other participants. They were part of the first cohort of *Oportunidades* beneficiaries during its first years of implementation (1998–2001).

*6.2.1 Alba: 'My mom told me to return to Tlahui because Oportunidades started. ... I didn't want to return, I wanted to study in Monterrey but my mother insisted'.*

Alba, 26, is the youngest daughter of an eight-child family which has relied on the migration of its female members since her mother was widowed. At the time of the interview, Alba was living with Rogelio, her partner, and their five-year-old daughter. I selected her case because it provides insights into the immediate effects of *Oportunidades* and the trajectories of beneficiaries who migrated as domestic workers.

Alba's mother was an agricultural worker who was widowed when Alba was nine and a pupil at the Salesian primary school; *Oportunidades* had not yet been introduced. Alba used to help her parents with their small business making and selling *gabanes* (a type of overcoat made of wool, similar to a poncho). Alba was in her fifth year of primary school when she first migrated, a year after her father died. She went to Oaxaca City to work as a housemaid, taken by her older sisters who were working there. She occasionally spent the weekend in Oaxaca and, during her school holidays, contributed, together with her sisters, to household expenses. The migration of Alba and her older sisters was a profitable investment for the household because it could rely on a more regular income. The death of Alba's father not only caused a loss of income but also left her mother with debts. Therefore, migration was a strategy both to spread any risk and to stabilise the family's income, as identified elsewhere in the migration literature (Clemens and Ogden, 2014; de Haas, 2006; Taylor *et al.*, 1999).

In her last year of primary school, Alba migrated to Monterrey to work and study. Her cousins, who were studying at a Salesian school and working as housemaids, invited her and found her a job as a housemaid. This time, Alba migrated not only for economic reasons but also motivated by the experiences and stories of her cousins, who she



described as her role models. However, one day her mother called, telling her to return because she had started receiving *Oportunidades* benefits. Although Alba wanted to stay in Monterrey, her mother saw *Oportunidades* as a way for her daughter to study in Tlahui and as an extra income for the household, as Alba explained:

I left school for a year because I thought ‘Better I start working and find a school here (Monterrey)’. My mom told me to return to Tlahui because *Oportunidades* had started. ... I didn’t want to return. I wanted to study in Monterrey but my mother insisted, saying ‘There is this support, return because they will give you money’, so I came back ... and yes, *Oportunidades* helped us because my father was not with us anymore and, before, my mother could not pay everything that we were asked for at school.

Her case illustrates that *Oportunidades* influenced the return of potential beneficiaries who were working or studying abroad, as the cash was perceived as an additional and meaningful income. As in Tama, *Oportunidades* was fungible, not only to be spent on the targeted beneficiary but also to be treated as general income for the needs of the entire household, especially for those families whose incomes were low.

When she completed senior-high, Alba’s mother used to motivate her to continue at school, hoping that she would be the first of the siblings to study for a degree and thus to have greater career opportunities. However, her mother’s lower levels of schooling restricted her ability to guide Alba (see Pells, 2011; Young Lives, 2012). Serneels and Dercon (2014), in India, observed that girls in rural areas were more likely to achieve greater levels of education when their mothers’ hopes and dreams for them were high, in spite of their fewer years of education. Alba had no relatives with higher education experience who could support her and eventually abandoned her idea of continuing her studies. However, she found a job as a teacher in the Salesian primary school. She worked for two years until she got pregnant and moved in with Rogelio. In that moment, her aspirations changed, and she left her job to more time to spend with her baby and Rogelio:

When I moved in with my partner things changed very much in my life. When I was by myself I could go anywhere I wanted, and when I got married I began thinking ‘What am I going to do tomorrow?’ or ‘How am I

going to make a living for my family?’ ... So starting my own family changed my way of thinking and the way I was living.

As mentioned, domestic work and childcare are part of the traditional identity constructed by Mexican women (Garcia, 2007; Tepechin, 2010). The idealised traditional woman is seen as the homemaker who puts her children’s needs above all else (Milicevic, 2010). Although Alba knew she had a better-paid job than others in Tlahui, her ideas of family responsibility and her perceived duties as a mother influenced her decision to resign. To earn a living, Alba taught Rogelio how to make *gabanes*, and they opened their own small business selling clothes and shoes by catalogue.

However, sales were low and the income from the business did not meet the needs of the household. When their daughter was a little older, Alba decided to migrate as a housemaid. The previous migration experience of her sisters was again a source of help and encouragement. However, although she was migrating again to increase her income, the migration decision and her experiences were different this time. While, the first time, her sisters took her to work, this time migrating as a domestic worker was her own choice. She also felt more confident due to her higher levels of education. For example, she mentioned that she could bargain with her female employer and even help the children in her care with their homework. While, before, she knew nothing about the working conditions of domestic employees, this time she knew about the sacrifices and hardships of migrating as a housemaid and still considered them worth enduring. This result corresponds to the findings of Miles (1996) and Nyamnjoh (2005), who found that housemaids who migrated from rural to urban areas recognised that harsh conditions and low wages in their destinations were the norm, but still considered their job as beneficial to the education of their children and as a path to social mobility.

Alba’s migration costs were lower than those of Rogelio would be because Alba would have access to housing, food and a stable income. Therefore, having Rogelio remain in Tlahui was perceived as the most convenient household strategy. This echoes the findings of Shaw (2010) in Sri Lanka, who found that males stayed working in the local economy while females migrated more frequently because their employment was more secure and their migration costs lower. The alternative for Alba and Rogelio would have been to continue living on an irregular income, as Rogelio explained:

At that time we were not selling very much and we felt we had very few options – that has always been our main problem, the money. Here, people no longer buy the clothes we make – for example the *gabán* is what we most make and here people no longer want to wear it; they prefer to wear jumpers or jackets and the *gabán* is losing its importance, so we have less work here, while the job that my wife does can be easily obtained abroad.

Since then, Alba has migrated three times to different cities within Mexico, the last time staying for 18 months, leaving her daughter in the care of Rogelio and her mother. She sent MX\$3,000 pesos every month, which she said was more than she could have earned if she had stayed in Tlahui. These remittances increased their living standards, in addition to providing a form of insurance, as Alba was sending cash that was not affected by the uncertainties of the local economy. Rogelio was also able to reduce his working hours, as Shaw (2010) observed. Nevertheless, Clemens and Ogden (2014) suggested that the partial withdrawal of individuals from the local labour market, as a result of increased remittances, was a positive outcome of migration because it increased the alternatives to labour market participation of those who stayed behind. The reduction of Rogelio's working hours enabled him to enrol at one of the local universities in Tlahui, thereby increasing his chances of a career once he completed university:

Now I can continue learning and probably, in future, could help more people with my studies... If I finish my studies I think we are going to do better, it would be very different right? I would be working on things related to what I'm studying and at the same time I could continue making the *gabanes* if I wanted to, but with a more stable income.

An additional effect of their increased income was that they could start building their own house. While this is a commonly observed aspiration for Mexican international migrants (Ravuri, 2014; Tucker *et al.*, 2013), this finding shows that internal migrants also contemplate this type of investment. Shaw (2010) also found that remittances from housemaids improved housing conditions or were used to start building new homes, although it could take three migrations to complete them. Alba wanted to start by building just one room as they realised that completing the house would take years, but she and her partner were aware that they would not have done it if Alba had not migrated.

Alba's case provides an additional perspective to the few evaluations of *Oportunidades* that discuss the trajectories of females (de la Rocha, 2009; Parker and Gandini, 2009). It confirms that female beneficiaries can make use of their social networks to undertake jobs that do not necessarily coincide with their years of education (de la Rocha, 2009). However, they are in a better position than previous Oaxacan women who migrated as housemaids without knowing how to read, write or speak Spanish, as described by Sandoval (2016). Alba exerted more agency, reduced the economic uncertainty of her family, and enabled her household, through her remittances, to continue investing in education – through her partner going to university. Although she did not pursue higher education, she hoped her daughter would study for a degree because she considered that she could have a more stable income if she studied longer. Therefore, although *Oportunidades* did not influence her decision to migrate, her education increased her aspirations as a mother and she was in a better position to influence the aspirations of her daughter and her accomplishments.

*6.2.2. Javier: 'To have an education motivated me, to continue studying, because my dad is a security guard and I don't want to stay there, I want to do better'.*

Javier, 23, is the third of four children in a family that relies on subsistence agriculture and the income of his father as a security guard. I selected his case because it illustrates the shaping of educational aspirations in Tlahui and the challenges faced by those who migrated to continue their education.

Although two of his older siblings completed senior-high school, Javier was the first who decided to study for a degree. His father completed junior-high school but his mother did not complete primary school and understood little Spanish. She used *Oportunidades* to buy food, clothes, shoes and school materials. After senior-high school, Javier decided that he wanted to continue studying:

To have an education motivated me, to continue studying, because my dad is a security guard and I don't want to stay there, I want to do better, I want to teach... I was thinking about studying engineering because I was interested in technology and I wanted to know more. I had been living in Tlahui for a long time and I wanted to see new places, meet new people, experience a new atmosphere, the type of work that is done abroad, how it

would be to live by myself... so I had that aspiration, to stand out, to finish my undergraduate degree.

Javier perceived education as leading to a better occupation and life than that achieved by his parents. Education, for Javier, had a symbolic value, perceived as the means to increase opportunities to become a professional and achieve social mobility and a higher status in Tlahui. Javier had older friends studying at university away from Tlahui, who told him that engineering was a good degree for future job opportunities.

Migration was the means both to achieve his educational goals and to fulfil the additional aspirations that it provokes. For example, migration could enable him to experience a new environment that involves speaking Spanish, living a different lifestyle, seeing new places and doing things by himself (see also Rao, 2010; Rao and Hossain, 2012). Therefore, migration was also perceived as a path to autonomy that would represent his passage into adulthood, as Boyden (2013) found when looking at the educational aspirations of young people from rural households in India, Ethiopia, Peru and Vietnam who migrate because they want to gain their independence. Javier's story illustrates that all these values are strongly associated with migration in Tlahui, above and beyond its instrumental value of accessing education.

Just after finishing senior-high, Javier enrolled with CONAFE<sup>23</sup> in order to receive a scholarship for his undergraduate degree. His father warned him that if he wanted to continue studying he could not support him economically. Indeed, the low education of his parents and their lack of experience constrained their ability to guide him in the transition from senior-high school to university. However, he found support in his friends from Tlahui, who informed him of the options available for continuing to study, thus highlighting the importance of peers in shaping educational aspirations and transmitting the required information (Ray, 2006):

I had to find ways to make my own money or to get a scholarship. I heard about CONAFE from a friend who told me 'There is this programme whereby you go to teach in other communities and they will help you economically, although it's not a lot', then I decided to join CONAFE so I

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<sup>23</sup> The National Council for Educational Development (CONAFE) seeks to recruit young people from rural localities, aged 16 to 29 and who have completed secondary school, to provide one year of community education services in rural towns within their state. In return they receive 30 months of scholarship to continue their studies for every year they worked at CONAFE.

could have a scholarship, and I stayed for two years in two different communities until I thought ‘I am getting old if I want to continue studying’, so I decided to sit the entry exam at my university.

He started his undergraduate degree in a city close to Oaxaca City. However, the tuition fees and his living costs were much higher than the funding he received. Javier decided to work and study at the same time. At weekends he travelled to Oaxaca City to undertake domestic chores in a family home. Although he sometimes felt discriminated against by the children of his female employer because he was not white and was from an indigenous rural locality, his job enabled him to continue funding his studies. It provided him with food and accommodation at the weekends, and compensated for his inability to find jobs in the city where he was studying. Therefore, like other men who pursue or have higher education and work in the domestic sector (Bartolomei, 2010), Javier saw doing a socially unvalued and inferior job as an opportunity to continue studying. Indeed, the distance and the anonymity of working in Oaxaca City allowed Javier to perform what in Tlahui would be considered demeaning work for him. The same observation is made by Rao (2010) and Rao and Hossain (2012) in the context of Bangladeshi migrants. Nevertheless, the lack of economic resources continued to be his main challenge:

I sometimes feel that I am worse off than when I was in Tlahui because I don't have enough money, I don't have any economic support and sometimes I think ‘What am I going to do?’. I need to eat, but I also need to buy school material, they ask us to bring things or money for the material that we need and I... in that aspect of my life I feel very poor.

Previous evidence suggests that the direct and indirect costs for rural youths of migrating to study could worsen rather than improve or alleviate their family's or their own economic situation (Boyden, 2013). Although Javier migrated in part to improve his personal and economic position (at least in the long term), the migration costs made him feel under greater hardship than when he was in Tlahui. His educational aspirations led him into more economic difficulties when he failed a module of his course and did not have the money to re-take the exam. He had to drop out for three months and work full-time in the same house to pay for it. In spite of these difficulties, and the educational opportunities available in Tlahui, he still believed studying elsewhere was a much better option:

Being away from home has motivated me to do better because I want to know what it is like to stand up by myself ...I know in Tlahui I would have had everything. I would have food and shelter, the school would be closer, my scholarship would be enough ... but because I left Tlahui, I can see there are more things now, more options ... it is OK to stay in Tlahui, but it's also important to give oneself the opportunity to live elsewhere, to know new places, to know new people, to have a new perspective, to speak Spanish more often, all that.

Migration was thus the means to obtain a different educational experience and knowledge that he could not acquire if he studied in Tlahui. Furthermore, it has enabled him to develop in an environment with different food, culture and language. In spite of the challenges, he was proud to show his family that he could continue being independent economically, while realising his educational dreams.

Javier's post-education plans were to return to Tlahui:

My goal is to return to Tlahui, to work there, to find a job if there is an opportunity... I have friends who are mathematicians, engineers, computer technicians and they also plan to return to Tlahui...however, I think I wouldn't be able to entirely practice my profession. If I worked in a company I would feel motivated to learn and it would be more challenging in a good way. But if I find the opportunity to work in Tlahui, it would be better.

Rural youth, compared to their non-rural counterparts, experience greater conflict between living near their parents and localities of origin and the desire to migrate in order to pursue their aspirations (Byun *et al.*, 2012; Donaldson, 1986). Although Javier migrated to further his education and improve his chances of social mobility, he also aspired to return and to apply those skills in Tlahui, influenced in part by the discourse in Tlahui that promotes education for both individual and collective benefit. The next case will explore the effects of this discourse on the shaping of education aspirations and the decision to return.

6.2.3 José: ‘One constantly heard “Yes, go out and study, but for the benefit of the community”’.

José, 25, is the third of a family of six children who relied on subsistence agriculture and the father’s work as a lumberman. His case illustrates how educational discourses and traditional values influenced his migration decision and the trajectories of beneficiaries.

José recalled that, during his years as a beneficiary, his mother made good use of the money, which motivated him to continue studying:

In senior-high, *Oportunidades* had a strong impact because you think ‘I have money to study’ and some of my peers only saw it like that; however, it is important when parents tell you ‘Yes, you get this money for this purpose’. So when I was in senior-high I saw that thanks to this income, my mom told me ‘We are going to buy you clothes and school materials’. So I had some economic support – not a lot but it allowed me to think ‘I want to continue studying because I know there is some economic support’.

*Oportunidades* enabled him to consider his school aspirations as more reachable because he perceived that he had the economic resources to support him. His educational aspirations were shaped by the discourse in Tlahui (transmitted, not only by teachers but also at the household level and by the wider Tlahui society) around the importance of education. He explained:

We have these ideas from the experiences of the first generation of professionals from Tlahui who promoted the idea of ‘Yes, go to study, go to train yourself, but you have to return because the community needs you’. So it is a very constant discourse from our parents, our grand-parents, our teachers, who tell us ‘We need you to study, we need you to prepare, you have to leave but then to return because the way to support your community is here’. This is more evident in senior-high, inspired by an ‘*Ayuujk*’ (Mixe) identity, where we studied the ‘*Ayuujk*’ language, we grew green vegetables, bred rabbits and so on, and we continually heard ‘Yes, go out and study but for the benefit of the community’... the fact that your cousin is studying, the fact that your uncle is a professional or a teacher, has encouraged my desire to be a professional’.



Dreams of the ‘good life’ are located on a larger map of ideas and beliefs shared by the wider community (Appadurai, 2004). José’s aspirations for the future were tied to socio-cultural norms that valued education because Tlahui perceived it as a collective asset for the town. As Ray (2006) has argued, aspirations are an outcome of collective connections, and are multidimensional, including other factors beyond socioeconomic standards. José highlighted the role of previous educational migrants (who later became his teachers) and other well-known members of the community, who encouraged him and his generation to continue studying. Both his family and the discourse of the community were important in transmitting these cultural values and norms, which influenced the meaning and the purpose of migration. As suggested in the theoretical framework, values associated with migration become part of community values themselves (Massey *et al.*, 1993). In Tlahui, these values were associated with the importance of education.

Other factors that contributed to the shaping of José’s wish to migrate to study were the experiences of previous migrants and the solid social networks that Tlahui has built in other cities where universities are located:

The fact that your uncle is a professional or a teacher has allowed you to nurture a desire to be a professional, so if you go to Oaxaca (City) to study you can get the support of your uncle, your godfather and ask them ‘Can I live in your house, paying less rent?’... There is now a broad social network that helps someone to continue studying longer than his/her parents did.

The existing social networks in Tlahui reduce the costs and risks of movement, increasing an individual’s capability to migrate. Indeed, other migrants from the family or the town influence migration decisions not only because the move becomes more achievable but also because their success inspires potential migrants. José, as other youths in Tlahui, observed other migrants who returned from studying and became teachers or were earning a more stable income than those with no formal education. These return migrants became social or intellectual leaders who shaped the educational institutions, values and organisation of Tlahui as a society. This supports the idea that individual aspirations are framed through the lives, ideas and achievements of other individuals within the ‘aspirations window’ (Bernard *et al.*, 2014; Ray, 2006). Hearing the successful stories of earlier professionals and their status in society had an impact on José’s aspirations.

José began to expand his social networks while he was in Tlahui. These were particularly useful when he needed information about higher education from sources beyond his parents and Tlahui. When he was studying at senior-high he worked as a volunteer in an association that supported children and youth, where he met people who later provided him with guidance and even funding. After completing senior-high, he migrated to Mexico City to work in a relative's small business, with the intention of saving money for his studies. Motivated and guided by the people he met in the association, he then took part in a national youth leadership contest that recognises the social commitment of young people in their localities. He won the award at both regional and national levels, which came with a cash prize. In the association he also met a friend who agreed to provide him with an initial income to enable him to overcome his economic constraints and start his studies in Oaxaca City. His social network further reduced his migration costs since he was able to ask his grandmother (who also lived there) for accommodation.

Once he started to study, he applied for an administration job at his university and rented an apartment on his own. Encouraged to apply by his university lecturers, he was awarded an additional scholarship from a partner university. Therefore, the new social networks he made in Oaxaca City continued to support him with information and guidance throughout his degree, showing that wider social networks beyond the local context of an individual are crucial to the realisation of educational aspirations (Adedokun and Balschweid, 2008; Bok, 2010). This contrasts with Tama, where the wider social networks created at the place of destination provided migrants with advice to migrate again to the USA or to other cities in Mexico, thus highlighting the distinct migration cultures of the two localities.

The more José studied, the more he realised that he wanted to progress beyond an undergraduate degree:

I could not stay at an undergraduate level because the most I could aspire to was to be a research assistant... first, I was not getting well paid and, second ... I wanted to do an MA...there was a call for indigenous grant holders so I thought 'This is my opportunity to do a Master's degree, I am young and I have no responsibilities'. I felt a need to learn more so I decided to do an MA and moved from Oaxaca to Mexico City.

José illustrates that the higher the levels of education achieved, the higher the aspirations of individuals (de Haas, 2010; Tafere, 2014). He not only aspired to a higher income but also to a higher academic level that allowed him to realise his professional goals. Once someone migrates, he or she is very likely to migrate again because the experience reinforces concepts of social mobility (Massey *et al.*, 1993). Since educational migration enabled him to improve his socio-economic position, further social mobility could be achieved if he continued migrating.

By the time of the interview, José was studying for his Master's. However, although Tlahui encouraged educational aspirations, attached to this was the responsibility to return. His reintegration into the community, this time as an adult, would involve fulfilling his duties under the *cargo* system. The previous generation of professionals perceived that the way to reintegrate youths after their studies, and to reconnect them to Tlahui society as a 'village son', was to make them responsible for their duties to the town through the *cargo* (Gallardo, 2013). Youths must start from the lowest *cargos* before they are considered to have sufficient local knowledge and the experience to have access to higher *cargos*. The *cargos* are regarded as another school where individuals learn 'to work for the benefit of the town, where one acquires new values, behaviour norms, and responsibilities' (Gallardo, 2013: 169). José expressed his desire to return to Tlahui, but the implications also created conflict with his desire to continue pursuing his professional dreams:

There is a challenge for us between being a professional and a community member... many people think 'If I had to study for five years and then return to Tlahui and they elect me for a *cargo*, when am I going to apply what I learned? All the hard work it took, all the effort, and without getting paid, it's not fair, right?' So, there is resistance because you compare your possibilities if you were in the city, where you don't have to give anything and there is a bigger job market, and Tlahui, where the job market is small, you need to undertake your *cargo* and you are going to start as a *topil* [low-rank officer].

The norms of Tlahui demand participation in the *cargo* system. This would require José to put aside his professional aspirations, at least for a year. This clash between personal aspirations and social expectations suggests that beneficiaries' decision to migrate is not only driven by socio-economic motives, as previous studies of *Oportunidades* identified

(Angelucci, 2012), or where greater returns on human capital are found (Azuara, 2009; de la Rocha, 2009; Yaschine, 2012). Socio-cultural norms, in places such as Tlahui, where tradition and local values are highly important, play a crucial role, not only in the decision to migrate, but also in the trajectories that beneficiaries follow.

### **6.3 Factors shaping aspirations and the decision to migrate**

In Tlahui, aspirations and migration decision-making were influenced by factors that were in some ways similar to Tama:

- specific sociocultural norms shaping the value given to education;
- households' allocation of *Oportunidades*;
- the influence of family members; and
- gender and norms of family responsibilities.

In Tlahui, these norms emphasised the importance of education but in particular ways which shaped beneficiaries' migration decisions. In this section I explore how these factors influenced each other and shaped aspirations in Tlahui.

#### *6.3.1 Socio-cultural norms*

Most beneficiaries (and non-beneficiaries) in my study completed senior-high and wanted to continue studying because education was seen as a path to better employment and social mobility. In Tlahui this view of education has its own unique historical roots that have shaped the current education and migration context.

As we have seen in the three case studies, in addition to schools and teachers, the vision of education in Tlahui is spread through the family and 'social spaces' of interaction where norms and community values are transmitted. Gallardo (2013: 178) suggested that Tlahui has three 'social spaces' where social norms are reinforced: the *cargo* system, the assembly and the *tequio*. Through these spaces, he argues that the cultural and social norms of what teachers and Tlahui society value are transmitted within the family, friends and extended family and participants in the *Mixe* religion. Such spaces facilitate the transmission of information among members of society, and reinforce 'community norms' and values that enable the shaping of educational aspirations among youths (Adedokun and Balschweid, 2008).

The value of education as a socio-cultural norm in Tlahui is tied to migration in two ways. First, people in Tlahui perceive migration as a way to extend one's academic formation, including enrolment in university or the acquisition of additional qualifications that would increase one's skills. However, more importantly, these skills should benefit the wider community. The Director of the BICAP highlighted:

We can be a bit different to other communities but without getting isolated. We have to learn Spanish, we also have to learn English, and we also have to coexist with other people. That's what we want to highlight, not only 'I am *Mixe*', I am *"Ayuujk jay"* and I don't care about the *Akats* (people from outside)'. No, here it is about coexistence, how to live together with other cultures, but without forgetting one's roots.

This perception (as I explained in Chapter 4) has its roots in the previous generation of professionals who benefited from educational migration not only because they improved their economic situation, but also because they acquired the skills to bargain with the state to promote the interests of Tlahui. As Nitya Rao (2010, 2014) has observed elsewhere, in Tlahui educational migration has been the trigger for societal transformation and a tool with which to question the dominance of the national elite. Tlahui people perceive themselves as having a leading role in education in the region, giving them a distinctive position that needs to be maintained. This creates the risk of becoming isolated and so educational migration is important in order to stay connected to the outside world and to bring this knowledge back to Tlahui for the benefit of its society. However, this can result in tension between collective and individual benefits and aspirations.

For example, while educational migration was considered highly important, Tlahui simultaneously designed its educational institutions (especially its senior-high school) as places where its youths could study from a *Mixe* perspective without experiencing detachment and the loss of their culture. Tlahui also created higher education institutions that offer another option for continued study for those who did not aspire or have the means to migrate. Therefore, migration is not encouraged in the same way as in Tama.

However, a tension existed between the promotion of education from a *Mixe* perspective and the professional aspirations of some youths, as this 26-year-old female return migrant beneficiary suggested:

I left because I wanted to continue studying in a different place because here I didn't like the school. We were in the fields all day, doing interviews in Tlahui or the nearby communities and I thought 'This is not going to help me at all because I want to study something different to community development issues'. This is why I wanted to continue studying in a different senior-high school and decided to move.

Despite efforts to create an education that responded to local collective interests, the aspirations of Tlahui youths were sometimes very different. Beneficiaries and non-beneficiaries who migrated after senior-high, such as José and Javier, or after junior-high school, as in the above example, were looking to expand their academic experience by attending universities outside Tlahui that offered other degrees, or a higher quality of education more in line with their personal ambitions (see also Boyden, 2013; Rao, 2010).

This presented further tension. Although these youths migrated and felt supported, they also knew they were expected to return, either voluntarily or through the *cargo*, as José illustrated, which sometimes prevented them from pursuing their professional goals. In Tlahui, the *cargo* also carries prestige and the person who does not undertake it or does it without enthusiasm would harm him/herself, the family and the town (J. Martinez, 2011). Some youths in Tlahui have had to choose between their professional careers and their duties as members of Tlahui. Although some found the way to make both compatible, others found this challenging.

Secondly, some beneficiaries and non-beneficiaries valued migration because they saw it as a path to social mobility. Whether for study or work, migration was a means to increase one's income, to get to know new places, to improve one's Spanish, or to gain skills (not necessarily through formal education). The successful stories of previous migrants inspired Tlahui youths and made them think that migration was worth it. These findings support de Haas' (2006) argument that internal migration, although far less lucrative than international migration, is more than a 'survival strategy' because it is undertaken not only for economic purposes.

However, in Tlahui these perceptions were drawn from the experience of previous educational migrants. The first professionals were recognised as individuals with great knowledge, who could improve their economic situation, and held a privileged position in the community – a process of educational and economic transformation in Tlahui begun through the *cargos*. Therefore, the ‘aspiration window’ of youths in Tlahui was shaped by the achievements of these educated former migrants.

However, although most beneficiaries and non-beneficiaries aspired to continue studying, many could not afford to migrate to do so, and so local universities played an important role. Other beneficiaries who migrated to continue studying abandoned their aspirations (once at destination) in favour of paid work, seen as a more realistic and achievable goal. One example of this was Maria, a beneficiary who initially started a degree in Tlahui, but then migrated to Mexico City to study for a degree that was more appealing to her. Once in the city she found a job as a cashier in a shop, abandoned her education and shaped new goals:

When you start to see the money you think, ‘Well, I think it’s not necessary to continue studying’. When I started to work my main goal was to continue studying, but I also needed time to work and I had to work full-time. It seemed impossible and I thought ‘I have to do something else if I am not going to study any more’. Then I looked for another goal which was to build my house and I thought ‘I will finish constructing it and then return’ – which I did after ten years.

Genicot and Ray (2009) suggest that more attainable aspirations do not create frustration and are more likely to encourage upward mobility when individuals have the resources to achieve them. Some Tlahui beneficiaries decided, once in their destinations, that joining the labour market was a more reasonable and fulfilling aspiration than studying (with few or non-existent economic resources), thus changing the meaning and purpose of their initial decision to migrate.

Therefore, these socio-cultural norms interacted and complemented each other in influencing the decision to migrate. *Oportunidades*, in most cases, coincided with a socio-cultural norm that promoted education and provided the funds to achieve this aspiration. Migration was the means to fulfil the education aspirations of individuals, although this sometimes clashed with the *Mixe* view of indigenous education for

collective benefit. Furthermore, migration was a way of fulfilling other aspirations of social mobility and increased social status, in emulation of the success of previous educated migrants.

### 6.3.2 Household strategies for allocating benefits from the *Oportunidades* programme

The allocation of *Oportunidades*' money in Tlahui had both similar and contrasting effects to those in Tama. One similarity was that, for those beneficiaries who aspired to continue studying, *Oportunidades* provided the funds. Indeed, the income of *Oportunidades* allowed female beneficiaries to dedicate less time to household chores because their parents were aware of the importance of education (see Adato *et al.*, 2000; Maldonado *et al.*, 2005; Skoufias and Parker, 2001 on other parts of Mexico). Similarly, males reduced their time in farming and paid work and focused on schooling, echoing the evaluations of Behrman *et al.* (2011) and Skoufias and Parker (2001).

However, as in Tama, my evidence suggested that the cash from *Oportunidades* was sometimes fungible and not treated as a separate source of income. Alba described how her mother motivated her to return not just so that she could study in Tlahui but also so that the entire household would have an extra source of income. As in Tama, *Oportunidades* was sometimes spent on the needs of older siblings studying outside Tlahui, when *Oportunidades* enabled migration but for those members of the household who moved to continue in higher education.

However, when *Oportunidades* was not enough for the household, or was allocated for other purposes, the effect on beneficiaries was different in Tlahui from in Tama. Beneficiaries in Tlahui did not share memories of perceiving themselves as poor, compared with their peers, and these notions did not inspire them to migrate. Most beneficiaries considered that completing senior-high school was more important and more beneficial in the long term than migrating to increase their own income. My results also suggested that beneficiaries in Tlahui engaged more in internal migration than those from Tama, not only because of their social networks but also because their decision was driven by aspirations to increase their education or to apply their skills, things which were both more achievable in Mexico than in the USA (see also Kandel and Massey, 2002; Stark and Taylor, 1991).

Although a majority of non-beneficiaries interviewed had completed senior-high school and continued on to higher education, not all had done so nor could they achieve their



educational aspirations. In the absence of an economic incentive, some non-beneficiaries perceived labour migration as more profitable than schooling driven by the stories of their friends or relatives living in other cities. In other cases, the households could not afford schooling, especially following costly traumas such as illness or the death of the head of household. Thus Emiliano, a non-beneficiary who was excluded from *Oportunidades* because his mother migrated to Mexico City to work after his father died,

I wanted to study. Probably, it would have been different if my mother had received *Oportunidades*... I think my decision would have changed because when you enrol at school you have to pay the fees, the books, school material, it is much more money... I had to follow my mom because I had to help her with my younger siblings.

*Oportunidades* also had unintended effects on non-beneficiaries' perceptions of poverty. Rubén, for example, did not receive *Oportunidades* because his parents had no birth certificates or official documentation. He felt poorer than his peer beneficiaries, especially the day after the others received *Oportunidades*:

One day after they [beneficiaries] received *Oportunidades*, they arrived wearing new clothes, new bags, they were wearing tennis shoes, while I was wearing my sandals... Probably it was not their intention but I felt humiliated. Because they were wearing new shoes and had new phones, they were showing off, and when you are young you feel that way ... Also they did not have to work at the weekends, while me and other friends had to work because there was not enough money or because we wanted to buy stuff like clothes or trainers or a football.

These cases show that *Oportunidades* did not reach those households that needed to be incorporated, whose young members were instead forced to work or to migrate to meet their household needs or the material items that their peer beneficiaries could afford.

In summary, as was the case in Tama, the way *Oportunidades* was spent influenced the wellbeing of beneficiaries. However, in Tlahui most parents considered the education of their children important and usually allocated it the proper support – which made the education aspirations of their children more attainable. However, there were some unforeseen consequences in terms of the inequalities provoked between beneficiaries

and non-beneficiaries. In the next section, I discuss the role of family members on beneficiaries' migration decisions.

### 6.3.3 *The influence of family members*

As the case studies have shown, the role of parents and other relatives was influential in beneficiaries' decisions to continue studying and to migrate. Parents of low socio-economic status in Tlahui valued education because they saw it as the means to a better occupation and a better life than they themselves had. Participants also wanted to continue studying to make their parents proud and to reward them for the sacrifices they made to give their offspring an education. *Oportunidades* provided the temporary funds that enabled this, at least until senior-high.

Rao and Hossain (2012), referring to the ideas of Bourdieu (1984), also suggest that parents with low levels of education themselves are interested in the education of their children because they want them to be 'socially included', achievable through learning 'particular linguistic and cultural competences, and social graces and connections, with the affordability of formal education itself being a mark of distinction' (2012: 422). The case studies showed that educational migration was perceived as an opportunity to speak Spanish, to mix with new people (including *mestizos*), to learn how to survive in the city, to gain a distinctive academic experience, to dress differently, and to achieve a better income in the long term. In the context of Tlahui, Gallardo (2013) said that those who previously migrated to study learnt a strategic language with which to negotiate with the outside world (mainly the state) and were recognised as having a privileged status within Tlahui society. Therefore, continued education also had symbolic importance for parents and beneficiaries, especially when the latter migrated, which would both increase their knowledge and gain recognition and respectability for themselves and their families. However, as mentioned, not everyone could afford educational migration or beneficiaries sometimes changed their ideas once at destination, making such recognition not accessible to everyone.

Despite the prevailing attitude in favour of education in Tlahui, some relatives advised beneficiaries to migrate for work. Family members with previous migration experience provided information and assistance to potential labour migrants aspiring to work in their areas of destination. This was more often the case for beneficiaries and non-beneficiaries who dropped out of education and migrated, influenced and

supported by their older siblings or cousins who were settled in internal destinations. This beneficiary dropped out of senior-high school:

My cousin and other friends told me the city was good. I thought I was going to make money easily and that I was going to change jobs constantly, but I realised it's not like that. In Tlahui you think that the city is pretty and that you are going to get everything such as clothes or new stuff, you think that it's going to be easier, but once you get here you don't achieve those things.

Therefore, as in Tama, the case studies from Tlahui suggest that *Oportunidades* had no control over the role that family members had on beneficiaries' decision to migrate for work. However, in Tlahui, most beneficiaries completed senior-high, suggesting that *Oportunidades* reinforced parents' decision to keep their children at school.

#### 6.3.4 Gender and family responsibility

Males and females in Tlahui perceived migration in different ways and their social and gender roles influenced their decisions accordingly. My case studies showed that the migration decision of male beneficiaries was partly influenced by the positive stories of their male peers or return migrants. However, their peers did not share the negative aspects or challenges of migration, as Garip and Asad (2016) found with the social mechanisms underlying Mexico–US migration. Therefore, males were curious and wanted to have the same labour or educational experiences themselves. However, for non-beneficiaries, and those beneficiaries who had achieved fewer years of education, their curiosity was more related to their ability to buy personal items that were not available in Tlahui, and to experience the adventure of living in another city, as this 28-year-old non-beneficiary return migrant from Mexico City narrated:

My dad gave me the opportunity to study but, because I wanted to know other places, I abandoned my studies. I also wanted to know what it felt like to work and to make your own money ... I saw some friends who returned to Tlahui – they were well-dressed, were wearing Converse shoes (I was wearing sandals) so I thought 'I also want those trainers and I also want to go'.

Male non-beneficiaries and beneficiaries who dropped out of school and migrated described worse labour conditions than did beneficiaries – such as working 12-hour days or getting paid the minimum wage for low-skilled jobs. Although they were ashamed, probably nobody in Tlahui would know about their jobs and, on their return, they could share their positive stories with their peers. More importantly, they would gain respectability among their peers because they were seen as adventurous, returning with new items, and having experienced living and working in the city. Furthermore, they could continue gaining status in Tlahui if they returned and participated in the *cargos*. For male beneficiaries, as mentioned, they felt that successful migration would result from their higher levels of education and the additional skills gained by living in the city. Nevertheless, both beneficiaries and non-beneficiaries felt that they were gaining recognition and skills abroad that would improve their image on their return to Tlahui, thus echoing the findings of Rao (2010) and Rao and Hossain (2012) amongst male Bangladeshi youths and their motives to migrate.

I could identify no great differences in female beneficiaries' and non-beneficiaries' decision to migrate because the latter in my sample also migrated in order to continue studying. They described similar economic constraints, situations and gender norms that influenced their decisions and life trajectories as males did.

Like males, female participants migrated out of curiosity, although perceiving migration as an experience to be undertaken with more caution, as this 26-year-old return migrant beneficiary from Oaxaca City noted:

I remember people sometimes related migration with going down the wrong path, because here we are not used to seeing bad things, so people said that if you looked after yourself as a girl things would go well, but you could also go down the wrong path and that could cause your downfall. People always said that, but I had girlfriends who went out and I wondered what life was like in another city, whether it was true or not, and I wanted to see for myself.

This perception was probably influenced by earlier ideas of women as carers, with family responsibilities that prevented them from migrating. However, while more females began to migrate to work or study, they also began to share their

stories and provided assistance or employment to other women, thus expanding their social networks, as observed by Hondagneu-Sotelo (1992) and Sandoval (2016). Negative perceptions of female migration were probably reduced when the migrants, like Alba, above, began to increase their household's income.

Nevertheless, female participants usually migrated less once they started to live with their partners or had children, as confirmed by the data in Figure 4.7, which showed how the female population pyramid, compared with males, has higher numbers from the age of 25 onwards, when marriage and childbearing start to take place. The persistent idea in Tlahui that women should be good wives and mothers might explain this, as might the fact that, in Tlahui, being married or living with a partner was respected and provided recognition (J. Martinez, 2011).

These gender norms are often transmitted from mothers to daughters, as this 25-year-old return migrant from Oaxaca City illustrates:

My mother asked me 'Why do you want to continue studying if you have a baby?' ... she is not very supportive, but my father tells me 'I would like to see at least one of my children finishing a degree – you were the closest to finishing, why don't you go back to studying?' But I don't know, I don't feel like doing it anymore, I don't want to leave my baby alone.

This example again illustrates mothers' importance in influencing their daughters' aspirations through gendered expectations. Therefore, although female beneficiaries completed more years of education than their mothers, persistent patriarchal gender norms can explain why evaluations of *Oportunidades* have found a high proportion of female beneficiaries to be neither studying nor working (e.g. Parker and Gandini, 2009; Yaschine, 2012).

However, as in Tama, female beneficiaries who did migrate increased their confidence because they moved on their own, for their own purposes, instead of migrating as daughters or wives. More importantly they will probably increase their impact on the aspirations and achievements of their own children, including their daughters. Finally, their increased years of schooling enable them to be positive role models compared to their own mothers (see also Beaman *et al.*, 2012; Bernard *et al.*, 2014).

#### 6.4 Aspirations of current beneficiaries and their decision to stay or to migrate

After looking at the experience of former beneficiaries in Tlahui, this section will now examine the aspirations of current beneficiaries of Tlahui and its hamlet Tejas. These findings are the result of the focus groups conducted with students of junior-high school in both localities, and senior-high school in Tlahui. As with Lindavista, Tejas does not have a senior-high school and is part of the *telesecundaria* system. However, participants mentioned they had the possibility to continue studying senior-high school in nearby localities, while staying at the shelters.<sup>24</sup>

As in Tama and Lindavista, beneficiaries in Tlahui and Tejas mentioned aspirations towards having “the basics” such as health, food, and work. However, other aspects of wellbeing were also highly valued, including social interactions such as the local parties, dances, afternoon activities in the town centre, and the everyday family life. They also felt proud of their *Mixe* origins and they acknowledged that they spoke the language inside and outside school, although beneficiaries of Tlahui had a better command of Spanish. In spite of these similarities, the situation and the aspirations of beneficiaries in both locations were not identical. Table 6.2 shows the aspirations of beneficiaries from both locations according to their responses in the questionnaire. I will analyse the particularities and differences of each locality in the following section.

##### 6.4.1 Tlahui

As in Tama, the aspirations of current beneficiaries from Tlahui reflected those of former beneficiaries, as did the factors that shaped them. Participants also understood well-being to be an individual and collective asset which was not only material but also cultural and social. They also expressed their desire to migrate to study but felt that it was their responsibility to live in Tlahui in the long term, help others and improve their town. I focus here on Tejas, where life and educational aspirations were similar for a majority of beneficiaries but where the levels of poverty were higher, and the barriers to achievement of their goals were higher.

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<sup>24</sup> These spaces offer accommodation and food to students from localities with no school facilities. Usually financed by the National Commission for the Development of Indigenous Peoples (CDI).

**Table 6.2 Aspirations of beneficiaries in Tlahui and Tejas (%)**

		<b>Tlahui town</b>	<b>Tejas (Tlahui)</b>
Type of aspiration	<ul style="list-style-type: none"> <li>• Further education</li> <li>• Find paid work</li> <li>• Unsure</li> </ul>	100 0 0	80 20 0
Goals that would be fulfilled through the aspirations listed above		<ul style="list-style-type: none"> <li>• To become someone in life</li> <li>• To support my family</li> <li>• It is the basis for life</li> <li>• To have a job</li> <li>• To improve my economic wellbeing</li> <li>• To have a better life than my parents</li> <li>• To make my family proud of me</li> <li>• To perform better at the <i>cargo</i> I want to hold</li> </ul>	<ul style="list-style-type: none"> <li>• To have a certain future</li> <li>• To achieve my dreams</li> <li>• I no longer want to study</li> <li>• It is important to continue studying</li> <li>• To have a better life than my parents</li> <li>• I like working</li> <li>• I want to leave and be someone important</li> <li>• To support my parents and my town</li> <li>• To be an agricultural worker</li> </ul>
Educational aspirations	Junior-high school	0	20
	Senior-high school	0	0
	Technical/teacher-training college	0	33
	Undergraduate	53	20
	Postgraduate	46	13
	Unknown	0	13
Professions aspired to		Doctor, architect, musician, engineer, lawyer, chef, designer	Teacher, engineer, technical career
Parents' approval to continue studying	Strongly agree	86	61
	More or less agree	13	10
	Somewhat agree	0	19
	No agreement	0	10
Migration destinations aspired to		Mexico City, State of Mexico, Oaxaca City	Yacochi, Atitlan, DF, USA
Perceived barriers		Lack of money, accommodation and information about universities/destination	Lack of money and support to continue studies; having nothing

#### 6.4.2 Tejas

In early November 2015, Tejas was on the front pages of the main Mexican national newspapers (Gil, 2015). The primary-school choir '*Tun'ääw kojpk'ääw*' (Song of the Earth) was selected to sing the Mexican national anthem at the Formula One Grand Prix in Mexico City. The Mexican government rewarded the children with an Apple Tablet computer each and a tour of Mexico City and its surroundings. A reporter from one of the main TV channels interviewed one of the children, who unexpectedly demanded Internet access and better infrastructure for his school, which had been damaged by rain (Maza, 2015). The day after the release of the report on national TV, the Ministry of Education sent a team to begin the total reconstruction of the school.

While Tlahui had the fewest young people not attending school, compared with other localities, its hamlet – Tejas – had the highest proportion aged 15 and over (see Table 4.14). The educational gap between Tlahui and Tejas is wider than between Tama and Lindavista, probably because the economic barriers to continued study are higher and

the population in Tejas has fewer social networks in the USA and the *taquerias* (if they wish to migrate) compared with Lindavista. One Year 3 junior-high school teacher in Tejas reported the following situation:

Only the students who are in the shelter<sup>25</sup> eat well, those who are not in the shelter come without having eaten and during the break they don't bring money ... they all play basketball, volleyball, football, because they don't eat. I tell them to bring fruit but they are not used to eating it. Around 12 o'clock they start to complain that they are hungry, and I can't expect them to make an effort in certain activities because they are only thinking about hunger, they have nothing in their stomachs and they drink lots of water because they are hungry.

Only in Tejas did participants of the focus group not mention owning conspicuous and status-giving items such as cars, big houses or luxuries as characteristics of well-being. They spoke more about basic necessities such as having a job, a house, a profession, and of owning land, as valuable well-being characteristics. Individuals, as we have seen, aspire for a better quality of life compared with those of their peers, as Ray (2006) suggests. Ray also argues that aspirations are shaped by what a person physically observes. Therefore, individuals close to beneficiaries (relatives, friends and teachers) and the things that beneficiaries observed around them were probably shaping their aspirations. Likewise, the socio-cultural values of Tlahui, including the value of education, have also been transmitted to Tejas through their native Tlahui teachers and those from nearby *Mixe* localities. As Chapter 4 highlighted, a large number of Tlahui professionals studied to become teachers and were motivated to return. Some found jobs in Tlahui town, while others went to the hamlets (including Tejas), especially the bilingual primary schools.

Tejas was the community, after Tlahui, with the highest proportion of questionnaire respondents (see Table 6.2) aspiring to continue studying. As in Tlahui, participants highlighted the importance of education as the way to achieve a better life, as one 15-year-old male beneficiary explained:

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<sup>25</sup> These students are usually from nearby localities to Tejas with no schools in their localities of origin. They live in and are offered food by the shelter, financed by the National Commission for the Development of Indigenous Peoples (CDI).



Education is important so this person can live a better life and avoid a life where...there is no love, no peace, where a person can't enjoy him/herself, that's why I want this person I imagine to continue studying, finish secondary and high school, and then earn a degree. He or she has to study at university, and in different institutions, not in only one.

As in Tlahui, participants, especially males, expressed a clear desire to migrate to continue studying. Females, however, were not sure why education was important, and were simply copying their male peers. Nevertheless, in the questionnaire most females reported that they wanted to continue studying after junior-high and that their parents were encouraging them. The males wanted to migrate to continue studying in neighbouring localities (Atitlán and Yachochi towns) because these senior-high schools offered accommodation and food. Beneficiaries reported that staff and students from these schools had recently been in Tejas, circulating information and encouraging youths to attend. This latter action motivated students, who could thus envisage that continuing their studies was achievable. After senior-high school, many male participants planned to continue studying in other cities in Mexico as a way to improve both their education and their Spanish, as did this male beneficiary at junior-high in Tlahui:

Teachers here are from the same community, they speak *Mixe*, we all speak *Mixe*... and when other people come and speak Spanish, some of us here feel ashamed to reply in Spanish. That is why... it is better to study outside Tlahui, to know other ... teachers and subjects, what the city is like, other types of...life, of institutions.

Using de Haas' (2011) structure/agency theory, the migration aspirations of these beneficiaries can be explained, first, by their increased access to education and information, and thus their aspirations, and, second, by their awareness and perceptions of better education opportunities elsewhere. Indeed, participants in Tejas were aspiring to study courses that they considered more feasible due to their economic constraints, since a majority contemplated taking technical courses or attending teacher-training school – options considered to be cheaper, shorter and easier to apply for in Tlahui or abroad. Therefore, the aspiration gap in Tejas was neither too wide nor too short, since beneficiaries were wishing for economically realistic, and therefore attainable, goals.

However, the questionnaire and the interviews with teachers (as this one from Tejas) showed that not all students in Tejas valued education and that the aspirations of some males were to migrate for work, and of females to migrate to work as housemaids and to get married:

I think my students don't value education... when I ask them they say 'I want to be a housewife, I want to work in Mexico City as a housemaid', so their aspirations don't go further than this, possibly because they have never been away from the community... some of them they had never been in Oaxaca City before a trip we did, so the only job they know is to work at home or in the fields. Thus many of them do not plan to continue studying. Now, I can say at least... nine of my 15 students want to continue studying, the others will migrate or get married.

These participants' lack of desire to continue studying can be explained by a number of factors. First, their lack of economic resources to cover school expenses and the need for them to contribute to the income of the household, as the questionnaire revealed. Both the school authorities and students in Tejas said that their main constraint was a lack of money, which, as in Lindavista and elsewhere, suggests that *Oportunidades* and the value of CCTs was insufficient (see Freeland, 2007; Hossain and Zeitlyn, 2010). For youths in Tejas these costs increased even more in the transition to senior-high, when students had to internally migrate. Although they were offered food and accommodation in the destination, they still had to pay for school materials and other expenses such as transport, food at the weekends, school uniforms, fees or pocket money – all significant expenses for households with high poverty indicators, as in Tejas. Likewise, teachers reported that their students usually had to carry out household chores such as looking after the cattle, working in the fields, caring for younger siblings or washing clothes. If they migrated to study they would reduce the household budget due to their school expenses and would not be able to contribute these household chores. As a result, some beneficiaries planned to migrate to work – a household strategy for gaining an extra source of income not correlated with low agricultural profits, a tactic which supports NELM theory (Taylor, 1999).

Correlated with the lack of economic resources was the lack of support for higher education from parents. Most parents in Tejas only (and sometimes never) completed primary school, so beneficiaries sought guidance and information from relatives or

outside Tejas. Teachers felt that they, alone, were responsible for persuading their students of the benefits of education and, to do this, showed the students how to complement formal education with the type of knowledge taught by their parents, as this *mestizo* headteacher in a Tejas junior-high explains:

There are two types of knowledge for our students – community knowledge and school knowledge – and they are ‘divorced’ here. We don’t know the strategies that parents use so their children retain the information they are given about the importance of the harvest, why and how to carry out rituals and sacrifices, the reasons for playing that music, wearing those clothes, having long nails, all that community learning...but the way students don’t forget the community life, they also shouldn’t forget and should understand the importance of physics, chemistry or maths.

Although the headteacher had worked in Tejas for several years and was familiar with its society’s values, he was not *Mixe* and did not speak the language. Students in Tejas came from a bilingual primary school where most of the teachers came from Tlahui and taught in *Mixe*. In contrast, the junior-high school was a federal school; the teachers were not necessarily *Mixe* and had to teach in Spanish. The headteacher said that two types of knowledge were ‘divorced’ because the Mexican school system was disconnected from the local context of indigenous localities such as Tejas. While, in Tlahui town, the education system designed by its professionals tried to avoid this clash and disconnection, in Tejas students struggled to learn according to Spanish concepts that were probably not part of their everyday lives.

Tejas illustrated the challenges in Mexico of teaching a national educational programme in a rural and multi-cultural context (Siguenza, 2015), and the difficulties students faced when they wished to continue studying beyond junior-high school. The only way of achieving this was to migrate in spite of the economic constraints. Beneficiaries in junior-high were aware of these economic constraints and other potential difficulties at destination:

*Aurelia*: They [people from the city] think that, because we are indigenous, we don’t know how to defend ourselves, and they speak badly to us.

*Rodolfo*: They make fun of us.

*Braulio*: Because they are from a city, they have the opportunity to continue studying, they don't worry about anything, they don't have to work like us, they receive money, their parents work... our situation here is very different.

Therefore, in spite of these perceived barriers, a majority of participants hoped to study. However, their aspirations were also multidimensional. Beneficiaries valued their language, their *Mixe* identity and the traditional knowledge that was not necessarily taught in a formal education system. They also considered migration as the way to improve their educational opportunities. However, others perceived migration as an important way of increasing their own and their family's income, as in Lindavista. Thus, the hamlets are less connected to the facilities and infrastructure found in the main towns, which affects the ability of individuals to dream of lives beyond their local context. Even if they do aspire to improve their lives beyond this local horizon, they are not capable of doing so because they face more economic barriers and they are geographically, socially and culturally even more isolated than the main towns.

## 6. 5 Summary

In this chapter, I have shown that educational aspirations in Tlahui were already present when *Oportunidades* was introduced. The programme supported these aspirations and made education more achievable for former beneficiaries, as my case studies showed:

- First, aspirations were shaped by a discourse around education, transmitted at school, at home and in everyday interactions in other social spaces. *Oportunidades* provided both a temporary improvement in the entire family's living standards and funds for continued education – seen as a means to social mobility. This discourse around education had an implicit association with migration, although it created tensions between Tlahui's ideology of cultural pride and the need to maintain connections with the wider society.
- Second, the influence of previous migrants was important, just as in Tama, but interacted with *Oportunidades* in a different way. For example, former beneficiaries in Tlahui did not perceive their own relative deprivation due to their cultural pride, nor did they experience the influence of wealthy return migrants from the USA or the *taquerias*. Their role models were those who had previously migrated to study, but

who had also acquired other skills, not necessarily through formal education, and social status that were also valued.

- Third, in terms of gender, former female beneficiaries were encouraged to complete senior-high in keeping with the general value accorded to education. While they were not prevented from continuing their education, in the end their trajectories were influenced by perceptions of women's roles and the expectation to settle down and start a family.

These combined factors influenced the migration decision and the trajectories of former beneficiaries. *Oportunidades* enabled an already existing system of values associated with education and migration; however the kind of migration, with an emphasis on return to participate in the *cargos*, was specific to this context. Therefore the programme did not change peoples' aspirations around migration, but enabled them to be met.

The chapter also examined the aspirations and the decision to migrate of current beneficiaries. The evidence in Tlahui confirmed that their aspirations were similar to those of former beneficiaries. In Tejas a majority of beneficiaries also had educational aspirations, suggesting that the socio-cultural norms of Tlahui, including the value of education, were transmitted to Tejas. However, the influence of *Oportunidades* was more limited in Tejas than in Tlahui, because, as in Lindavista, the other sources of income for Tejas' households were fewer, and the value of *Oportunidades* not enough to supplement the household income and the needs of the beneficiaries. Indeed, although beneficiaries in Tejas aspired to continue studying, they also reported greater barriers – the costs of migrating and studying abroad, the lack of parental support, and their family economic responsibilities.

Thus far I have shown that the influence of *Oportunidades* on the decision to migrate depends very much on the aspirations of beneficiaries, the shaping of these aspirations and the perceived barriers to their achievement. In order to have a full picture of the influence that *Oportunidades* is making in the lives of beneficiaries, both short- and long-term, the role of context in the four localities needs to be considered jointly – one of the goals of the final, concluding, chapter.

# 7

## Final Conclusions

### 7.1 The influence of *Oportunidades* on the decision to migrate

My initial research question hypothesised the multiple ways in which *Oportunidades* may influence the decision to migrate, focusing on beneficiaries and their households. Here, I return to existing theories of migration and consider what the outcomes would be if *Oportunidades* were included in the decision to migrate.

The first supposition was that *Oportunidades* would reduce migration, as the income and wellbeing of beneficiaries would increase. My findings have shown that this was partly the result of the programme, since most of the participants in Tama and Tlahui completed senior-high in their home villages; however other factors mediated its impact. The most acknowledged influence of *Oportunidades* was that it provided a temporary improvement in the living standards for a participant's entire family, including funds for education that, in most cases, reduced beneficiaries' incentives to migrate while they were studying in their villages. Nevertheless, the direct effect on beneficiaries was mediated by the economic circumstances of the household. For example, in Tama and Tlahui the cash was often allocated to the immediate needs of the entire family, not only to those of the beneficiary. In other instances, the cash benefited other members of the household, mainly older siblings who were studying abroad and not receiving *Oportunidades*. Although beneficiaries felt that the cash was improving the wellbeing of the entire household, they did not necessarily perceive a direct improvement in their own wellbeing, and this sometimes influenced an earlier decision to migrate, especially in Tama. In other households, *Oportunidades* became the main income, in addition to that (though limited) of the mother, since the head of the household often reduced his working hours or allocated the family's income for his own needs. In these cases, *Oportunidades* was reduced in its impact both because mothers depended more on it and because they also had to increase their working hours to supplement the lower or non-existent income from their husbands.

In contexts of higher poverty, such as in Lindavista and Tejas, *Oportunidades* also improved the living standards of beneficiaries and their households, reducing the need for the former to migrate while schools were still available. However, the transfer represented a larger proportion of the household's income and was insufficient to cover the needs of the family and the educational expenses of the beneficiary. Therefore, the data from Lindavista and Tejas suggested that, for households with lower incomes, the influence of *Oportunidades* was reduced because the transfer did not represent an extra meaningful income for the family and was not enough to satisfy all the household's needs. As a result, beneficiaries from the hamlets reported a lack of funds for their current education and their usual need to support their households through domestic chores or agricultural labour.

The second assumption was that *Oportunidades*, by increasing educational levels and human capital and then raising aspirations, would increase or complement the migration of beneficiaries in the long term. My findings show that most beneficiaries migrated after *Oportunidades*. However, this second hypothesis does not specify the type of migration aspiration which beneficiaries would develop – whether these would be educational in order to continue increasing their human capital, or labour in order to increase their income. Indeed, the second hypothesis also does not specify the meaning behind migration – i.e. whether migration was perceived only as a means to increase income or receive more education, or whether it was undertaken as a 'rite of passage' or a path to independence and personal improvement. My findings show that participants made their decision within specific local and household contexts. In this thesis, I have shown how these contexts went beyond purely economic motivation, and showed the various ways in which beneficiaries and their households decided whether or not to migrate.

My results also support the third hypothesis: that *Oportunidades* has a variety of impacts when beneficiaries are exposed to the different migration contexts at the local and the household levels. This effect has clear development repercussions. The outcome of the influence of *Oportunidades* on the decision to migrate is very dependent on these contextual variables, mainly the migration context of each village, such as the social and cultural norms around the purpose and meaning of migration and the circumstances of migrants' households. This explains the opposite outcomes of *Oportunidades* for Tama and Tlahui. Moreover, the outcome of *Oportunidades* was mediated by what the

household and society considered as a means to achieve social mobility. Although the intended outcome of *Oportunidades* was to achieve social mobility through increased education, which would lead to increased employment opportunities for beneficiaries, my participants, their households and Tama and Tlahui society had different understandings of how to achieve socio-economic mobility. I use Rao's (2010: 138) definition when I refer to the means that individuals use to achieve upward mobility:

...the attempts to change the relational dynamics of social domination with a view to achieving a greater measure of equality for themselves and their families in society, both in terms of opportunities and life changes.

Therefore, there was a variety of ways in which individuals attempted to change their lives. In each town, these attempts also influenced the migration context, the social norms, the social networks and the perceptions of who migrated and why.

In Tama, beneficiaries developed education and labour aspirations that were competing in the decision to migrate. The findings of Chapter 4 (context) and 5 (Tama) have shown that the influence of international and internal migrants, especially the *patrones*, created a perception that success, social mobility and status were achieved through labour migration. Migration was perceived as an opportunity to increase income, get to know the city, gain skills and respectability, learn about the type of work that the *taqueros* or the migrants in the USA undertake, and acquire luxury goods. The case of Tama showed that the interpretations and perceptions of social mobility are not necessarily founded in a causal link between education and professional jobs, as the logic behind *Oportunidades* assumed. Success, recognition and social mobility were related to the increased incomes that could be achieved through migrating to the *taquerias* or the USA. Previous migrants in Tama had shown that there were alternative paths to social mobility, and were influencing not only the aspirations of beneficiaries but also their ability to migrate since they provided immediate access to jobs and the migration experience as a 'rite of passage'.

Therefore, while *Oportunidades*, on the one hand, influenced their decision to migrate through increasing the educational aspirations of Tama beneficiaries, on the other, the outcome was the exact opposite: the existing migration context influenced the aspirations and the intended outcome of *Oportunidades*. Migration influenced the outcome of *Oportunidades* in two ways – in addition to the perception of *patrones* and



international migrants as role models, the social networks and the available migration resources meant that beneficiaries preferred to migrate to work at the *taquerias* or in the USA. In some cases, this influence was stronger and more appealing than the return to education, and this led some beneficiaries to abandon *Oportunidades* and to migrate. Friends, relatives and partners who were already working at the *taquerias* or in the USA were also involved in the migration decision. In addition, when *Oportunidades* was not enough for the immediate needs of the households, or the beneficiary felt that s/he was not benefiting from the money, the returns on labour migration were also perceived to be greater. The influence of migration on the intended outcomes of *Oportunidades* was more pronounced in Lindavista, to where the migration context of Tama had spread, and the lack of schools beyond the basic level reduced educational aspirations. Beneficiaries and their households considered the returns on migration to be higher than on education. As a result, some in Lindavista began to drop out of junior-high school to migrate, while others clearly migrated for work after leaving junior-high. From the research in this thesis it is clear that other ways of achieving social mobility and increasing one's income were contemplated and considered more efficient than the benefits of *Oportunidades* and education. Thus, *Oportunidades* does not guarantee that beneficiaries will develop aspirations to continue studying.

On the other hand, migration in Tama contributed to the intended outcomes of *Oportunidades* through international remittances that were spent on education and consumption. Nevertheless, the outcome on education was not linear, as beneficiaries in these households did not necessarily develop aspirations to study but to migrate. While some decided to migrate to the USA after senior-high, others abandoned school and migrated in order to reunite with their families, influenced by the idea of increasing their standard of living in the USA, or by their perceived economic household responsibilities, as we saw clearly in Lindavista. In these cases, *Oportunidades* was incorporated in a social context where families had been transmitting socio-cultural norms about the meaning of migration and its importance for shared understandings of family responsibilities. The data from Tama and Lindavista revealed that *Oportunidades* was implemented in a context where migration flows to the *taquerias* and the USA continued, regardless of the intended outcome of *Oportunidades*.

Tlahui has experienced a completely different set of interactions regarding the influence of *Oportunidades* on migration. The data in Chapter 4 (context) and 6 (Tlahui) showed

that education was rewarded by society and seen as a measure of success. In contrast to Tama, where the value of education came up against the value of labour migration, in Tlahui, beneficiaries migrated in order to improve their school opportunities because education was equated with social mobility. The role models were not the *patrones* or international migrants but previous educational migrants who improved their economic situation and social status and triggered social change. Education was promoted because the Catholic Church was welcomed by Tlahui society and sponsored the first migration to study of professionals, expanding their social networks. The town also realised that they needed a literate population who could speak and write Spanish, negotiate with state officials and overcome disadvantageous power relations with the Mexican state. Until today, education has served that purpose. Tlahui society has also continued promoting education in order to maintain its perceived leading position in the region, and to improve living conditions in the town.

Throughout this thesis, I have tried to avoid the use of the term ‘community’; however, I use it here to show how, through one of its main intellectuals, Floriberto Diaz, Tlahui understands it. Floriberto explained that, in *Mixe*, the word ‘community’ is constructed from the words ‘*näjx*’ (land) and ‘*käjp*’ (people). ‘Land’ makes possible the existence of ‘people’, but ‘people’ give meaning to ‘land’ (Robles and Cardoso, 2007: 39). Floriberto argued that education – which should ideally be designed by the community itself – must respond to the interests of the community and its members and should prepare Tlahui students in this way. As I explained in Chapters 4 and 6, the influence of Floriberto and other educational migrants transmitted the value of education through the institutions they promoted, the *cargos* they undertook, and the encouragement they gave other professionals to return to Tlahui. For this reason, the benefits of education were not only perceived as individual, but also as collective.

*Oportunidades* and its intended outcomes, in this context, were favourably viewed. Education was already valued when the programme was implemented. Data from my case studies revealed that one of the outcomes was that potential beneficiaries who were studying abroad returned to Tlahui to study, so that their families could benefit from the extra income. The money made education for beneficiaries possible by supporting their aspirations to complete senior-high school while improving their households’ living standards. Their decision to migrate was influenced by their desire to continue studying and, compared to Tama, very few beneficiaries abandoned school to migrate for work.

As in Tlahui, I found that beneficiaries did not see themselves as poor in relation to their peers or other members in society, not because their household incomes were higher, but because of the view that future living standards could be improved through educational migration, and because the impact of internal and international remittances did not influence aspirations in the same way as it did in Tama. To some extent, this was another important factor that mediated the impact of *Oportunidades* in such a contrasting way.

The socio-cultural norms of Tlahui, including the value of education, also spread to its hamlet of Tejas, where a majority of beneficiaries aspired to migrate to continue studying. However, as in Lindavista, they felt that there were more barriers – especially the lack of funds to migrate and of parental support and their economic family responsibilities after finishing basic education. These findings show that, although beneficiaries shape their educational aspirations in contexts of higher poverty, *Oportunidades* plays a limited role in supporting them due to socio-economic inequalities between the main towns and the hamlets and because *Oportunidades* has to support higher costs of living.

Overall, in this thesis I have tried to unpack both beneficiaries' decision to migrate and the influence of *Oportunidades*. My findings have shown that *Oportunidades* made education possible for those who wanted to complete their studies in their home towns. Nevertheless, this did not necessarily translate into aspirations for continuing education. My data have revealed that beneficiaries were tied to their families and communities and their migration decisions were rarely made in isolation. Although my findings appear to reflect NELM theory, this theory only focuses on local market imperfections, while my thesis has clearly shown that this decision was made over and above economic dimensions. In Tama and Tlahui, beneficiaries' decision to migrate after *Oportunidades* reflected the better educational or labour prospects influencing participants' aspirations. Migration was also influenced by what each society valued and was reproduced through the social networks that each town developed. It also served as a strategy to overcome economic, social and ethnic inequalities, and as an opportunity to experience independence and different social behaviours. This thesis has thus shown that beneficiaries' decision to migrate was motivated not by one single factor but by different factors simultaneously.

Nevertheless, beneficiaries certainly took decisions according to their aspirations and abilities, making my findings closer to structure/agency theory. Structure was useful to understand the decision to migrate because beneficiaries shared clear social and cultural norms which translated into an understood social behaviour of migrating to realise aspirations (Scott and Marshall, 2009). The concept of structure incorporates cultural norms in the analysis of aspirations that, according to Appadurai (2004), are shaped in interaction with collective meanings in society. Furthermore, as this thesis has shown, the impact of CCTs on migration can be highly influenced by the local context in which they are implemented. Following de Haas' (2011) structure/agency theoretical approach, structural factors in each town (such as their particular historical engagement with migration, the social networks that they developed, their economic and social characteristics, the effect of the educational and economic policies undertaken by the Mexican state and the arrival of *Oportunidades*), all had a strong impact on migration decisions. Based on their particular structures and abilities, beneficiaries utilised their migration agency to fulfil their aspirations. As de Haas (2006: 577) has argued: 'Migration is a livelihood strategy for overcoming local development and opportunity constraints in the broadest sense'. This 'broadest sense' of opportunity and development needs to include local cultural meanings and understandings of these terms.

However, the decision to migrate was not only shaped by culture, social behaviour and structures. The decision was mostly taken at the household level (Stark and Taylor, 1991; Taylor, 1999), taking relative income considerations into account and whether the returns on human capital could be more profitable in Mexico or the USA. Likewise, beneficiaries took into account the income differentials between their localities of origin and other urban locations, the costs of migration and the likelihood of them obtaining a job relatively quickly (Todaro, 1969). Likewise, social networks also impacted on the type of migration that former beneficiaries undertook (internal or international), the type of jobs they performed, and the messages that they transmitted to their localities of origin about the opportunities and standard of living in their place of destination (Boyd, 1989). Migration in each town continued its own flow because 'Each act of migration generates a set of irreversible changes in individual motivations, social structures, and cultural values that alter the context within which future migration decisions are made' (Massey *et al.*, 1994b: 1498). Therefore, future research looking at the effects of CCTs on migration can proceed on the basis that migration motives are the product of multiple

factors beyond (but not excluding) market imperfections, including social and cultural factors which shape constantly evolving structures. Rather than trying to establish a linear impact of CCTs on migration, my research has shown that beneficiaries do not have just one motivation to migrate and that their contexts are shaped by different socio-economic structures that can only be understood through empirical research.

## **7.2 The relationship between *Oportunidades* and internal and international remittances**

One research question in this thesis relates to the use of *Oportunidades* and internal/international remittances and how they complement each other. However, my data only deals with Tama, not because Tlahui has no remittance flows but because, in Tama, the effects of both internal and international remittances were more pronounced and impacted not only on the *cargo* system, as Chapter 4 showed, but also on Tama beneficiaries' aspirations and migration decisions (Chapter 5).

In Tama, households receiving international remittances used the money to complement *Oportunidades* in a positive way because their household income was higher and the allocation of the cash transfer could be used for its intended purpose. *Oportunidades* also enabled these households to save and to use the cash for emergencies – in case remittances did not arrive on time; overall both sources of income enabled households to improve their living conditions. The households reported investing in agriculture, the construction of houses and the creation of small family businesses. Nevertheless, their beneficiary members did not necessarily increase their educational aspirations, either because they considered the returns on migration greater than on education, or because their households expected them to migrate to continue financially supporting their families.

Nevertheless, the allocation of remittances had an influence not only on the households but, at the local level, on the socio-cultural norms that society shaped and the aspirations of beneficiaries. Internal and international remittances were also used to enhance social status and the duties of the *cargo*, which migrants considered as extremely important to preserve their ties and their right to live in Tama. Although these remittances improved the household's living conditions and helped significantly with the expenses of the local parties and the *cargos*, they also created feelings of relative deprivation among those left behind. Migrants became local role models, returning with

new items, styles and norms of consumption. Remittances in Tama and the increasing levels of education of the town's youth had a combined positive effect, as described by de Haas (2006: 578):

Exposure to the relative wealth of migrants, along with drastically improved education and increasing media exposure, has spurred aspirations and increased feelings of relative deprivation among non-migrants ... thus, migration seems to be more the result of a certain level of increased personal aspirations, combined with relative deprivation, than of absolute poverty.

My case studies showed that beneficiaries in Tama (and Lindavista) perceived themselves as poor and engaged in migration to improve their personal position or household income. Some delayed their decision to migrate until they had completed senior-high school, while others abandoned their studies to increase their or their households' income. Therefore, *Oportunidades* contributed to the increase in beneficiaries' levels of education; however, this overlapped with their constant exposure to the wealth of migrants, increasing their desire to migrate. Nevertheless, I have argued that *Oportunidades* did *not* influence their decision to migrate as they did not increase their educational aspirations as the programme intended but, rather, abandoned the programme in favour of work or completed their studies and migrated to reduce their relative deprivation.

This result did not emerge in Tlahui, where society did not witness these large flows of remittances donated by the *patrones* or USA migrants for the parties in order to avoid a *cargo*. In contrast, Tlahui used the *cargos* as a social mechanism to avoid wide economic inequalities. Although individuals who were better off economically could fund and were elected for higher *cargos*, society did not accept large donations from migrants hoping to avoid a *cargo*, nor the payment of substitutes for high *cargos* – which all members had to undertake, starting from the lowliest position, if they wanted to be considered part of Tlahui society. While, in Tama, prestige, recognition and status could be achieved through wealth, in Tlahui these were achieved through the *cargos*.

Nevertheless, these results do not suggest that Tama's internal and international remittances did not contribute to development or that these changes in society were undermining *Mixe* traditions and the loss of the *cargo*'s value. This result could be

interpreted in different ways. First, paying a substitute meant increasing the salary of an individual based in Tama who was on a lower income. Second, internal and international remittances had an impact on the incomes of non-migrant households, who benefited from the purchases and expenditure of migrants and their families, including that for local parties. Third, migrants were also supporting the cultural practices of local parties in a way that allowed them to be represented and be part of Tama. Therefore, they give great importance to the preservation of local traditions – such as the parties and their expenditure, including fireworks, the hosting of the musical bands, and trophies, prizes and decorations. This expenditure is not for individual but for the collective benefit. As Burrell (2005: 26) witnessed in Guatemala, international remittances were used for local parties there: ‘A role for a migrant may be seen as concrete proof of one’s continued alliance with and desire to belong to the community, honouring a common past while seeking to create building blocks for a shared future’.

From my research, it is clear that these contributions stemmed not only from international remittances, as most studies on Oaxaca have suggested (e.g. Mountz and Wright, 1996; Robson and Wiest, 2014; Van Wey *et al.*, 2005) but, in Tama, were also provided by the internal remittances of the *patrones*. This leads me to another misinterpretation in the literature of migration. Remitters of large amounts of money are not only international migrants and are not only low-skilled individuals who send money for consumption needs. Indeed, the *patrones* contributed so that the aspirations of youths were more achievable – by offering them jobs, higher incomes than in Tama, the opportunity to learn new skills at the *taquerias*, to speak Spanish and to have access to the migration experience of which they dreamed. Access to these opportunities also facilitated migration decisions in Tama and was part of the trajectories of many of my participants after *Oportunidades*.

### **7.3 The influence of *Oportunidades* on the life trajectories and the long-term outcomes of beneficiaries**

My final research question was designed to contribute insights into the life trajectories of beneficiaries after *Oportunidades*. My data have revealed that, although *Oportunidades* was designed, as a long-term outcome, to break the inter-generational transmission of poverty and to improve the social mobility of its beneficiaries, the impact of the programme on this last goal was limited by beneficiaries’ overall lack of resources. These would have included financial resources and state policies that would

support their desire to access higher education institutions, or obtain jobs that responded to their skills and abilities. For some beneficiaries, the option to continue studying was dismissed at a very early age or immediately after junior- or senior-high school due to their households' lack of resources. Some migrated for employment in order to increase their own income and that of their households if necessary.

Nevertheless, my findings have also shown that, in spite of a lack of policies that would enable them to achieve their aspirations after *Oportunidades*, beneficiaries adopted other strategies, making use of their available economic resources and social networks. Therefore, although they faced structural limitations, they did not remain passive but exercised their agency in order to realise their dreams.

In Tama, beneficiaries wishing to work made use of their social networks in the *taquerias* and the USA to increase their income. Although *Oportunidades* would expect that these beneficiaries found jobs that responded to their skills, the reality is that they looked for jobs where they knew they had secure employment. For them, social networks were more effective than education. Beneficiaries increased their income through work – some made use of their social skills to access other types of job, while others, once in the *taquerias*, felt they wanted a better job and a higher salary, reinforcing an aspiration to continue studying in order to achieve them. This last finding shows that aspirations change at destination and are constantly evolving.

This was also true for beneficiaries who migrated to continue studying. For example, in Tama and Tlahui, while beneficiaries migrated for education, some abandoned this plan once they began to make their own money. After migrating they acquired a different concept of social mobility and adopted work aspirations that would enable them to purchase things on sale in their destinations. In other cases, beneficiaries could not afford their education and migration expenses, so abandoned this aspiration and entered the labour market. While some shaped a new goal that was more attainable with their means, others suffered from aspiration failure and returned to their home towns.

These findings illustrate that the transition, such as that expected by *Oportunidades*, from education to skilled jobs is not straightforward (Rao, 2010). This thesis has contributed to the advancement of our understanding of the way in which these transitions take place and the different meanings and paths to social mobility for beneficiaries. *Oportunidades* and its previous evaluations have considered social



mobility from a narrow focus that assumes that the break in the inter-generational transmission of poverty takes place when beneficiaries have a successful transition from higher levels of schooling to better jobs. With this view in mind, previous evaluations of *Oportunidades* and the designers of the programme have ignored the fact that beneficiaries are embedded in different local contexts and household dynamics and that, most of the time, as the data showed, their decisions are not taken individually. Beneficiaries considered their families' and localities' expectations of them, what social mobility meant in their context, and how this could be achieved – whether through education or labour migration.

For some, their interpretation of social mobility might seem to overlap with the intended outcomes of the programme, while other individuals had different understandings. For example, in Tlahui, understandings of social mobility were not only individual but also collective. Indeed, even though education was the path to the achievement of upward mobility, the educational vision and the institutions that Tlahui developed were very specific to its context. Education had a different value and responded to different aims than a simple linear linkage between education and higher incomes. In Tama, social mobility did not always equate with the profits of education, since individuals had been increasing their income and status in the town through work migration.

This leads us to what beneficiaries considered to be their accessible means of realising their dreams. They made use of their available resources in order to improve their living conditions and that of their families and localities, according to what they valued. In Tama, some beneficiaries felt that labour migration to the USA or in *taquerias* was more valued and provided more economic security than educational migration. This vision was reproduced with more clarity in Lindavista where, in the absence of school options beyond basic education, the most favourable path to social mobility and economic security became migration. In Tlahui, even when understandings of social mobility were closer to the design of *Oportunidades*, beneficiaries faced economic constraints and gender or family responsibility norms that shaped their aspirations, transitions and their likelihood of inheriting the economic status of their parents. This was even clearer for Lindavista and Tejas. In Lindavista, most beneficiaries did not even contemplate further education and labour migration was considered the almost unique path to social mobility. In Tejas, although most beneficiaries aspired to continue studying, their lack of economic resources was the main barrier. Therefore, the realities

of beneficiaries' lives were far more complex than an assumption of a straightforward transition from education to skilled jobs would allow.

Previous research looking at the influence of *Oportunidades* on migration was often limited, as it tended to de-contextualise the decision to migrate, including beneficiaries' understandings of social mobility, by not considering them as part of household dynamics, wider socio-cultural norms and economic structures. For this reason, qualitative research such as that which I conducted for this thesis, is of great value, as it shows the factors that shape aspirations, provides insights into the context in which CCTs such as *Oportunidades* are implemented and can explain the different outcomes identified in the quantitative evaluations.

#### **7.4 Limitations of this thesis**

While this thesis has revealed many of the contextual factors shaping the effectiveness of *Oportunidades* and its impact on decisions to migrate, a number of limitations need to be taken into account. The *first limitation* relates to the specific locality of the research, which makes the findings hard to generalise. Therefore, my results from Tama and Tlahui and their hamlets are not necessarily representative of the range of effects that cash transfers can have on the decision to migrate, but nevertheless reveal their theoretical effects, which can be reproduced in other contexts in order to continue exploring these theoretical linkages. For example, the theoretical findings can be applied in other contexts by posing questions in the field such as 'How does the population itself understand social mobility? What is the migration history and socio-economic context of the locality? How does the population understand wellbeing and what do they value? What are the education history and characteristics of the schools? What are the barriers to the realisation of their goals that people perceive? In this way, my theoretical findings contribute to future research and can be applied in other settings where CCTs and migration are linked.

A *second limitation* is related to the nature of qualitative research, which develops particular findings that are time- and context-bound working hypotheses (Scott, 2011). The result of my research, therefore, corresponds to the first cohort of beneficiaries during the initial years of the implementation of *Oportunidades* (1998–2001). Part of the evidence also corresponds to current beneficiaries in Tama, Tlahui, Lindavista and Tejas, during their third year of junior-high or senior-high school. Their experiences

also correspond to the specific historical, social and economic contexts that shaped their towns up to the time I was conducting fieldwork. While the research could provide an analysis of the factors that shaped their decisions and their trajectories, this thesis has not been able to incorporate the influence of other time factors that can continue to shape these decisions, particularly regarding the uncertainty surrounding migration which surfaced under the new USA administration in 2017. Further qualitative research would be useful that continues to evaluate the circumstances in which the *Oportunidades* programme can make a difference in the lives of beneficiaries and how its positive effects can be maximised. Future research would also be useful to examine the decisions that recent graduates of the programme take, their constraints and the agency they demonstrate to gain support in their transition and enable them to realise their aspirations.

In spite of the limitations of this research, due to its qualitative nature, this was also one of its main strengths and contributions to the field. While the quantitative evaluations identified the correlation between *Oportunidades* and migration, focusing on whether the programme reduces or increases migration, this thesis has contributed by offering contextualised explanations for the contrasting results that the quantitative evaluations identified. Tama and Tlahui offered a unique setting in which to compare the different impacts that *Oportunidades* can have according to the specific historical, social and economic circumstances of the places where it was implemented. While *Oportunidades* was designed to produce equal effects and assumed that individuals in rural Mexico shared similar characteristics and were in similar situations, Tama and Tlahui provided evidence that the particular contexts where the programme was implemented shaped the effects of its intended outcome. Further qualitative research would be very valuable in providing ongoing insights into the results that *Oportunidades* is seeing in other parts of Mexico.

Tama and Tlahui clearly illustrate the variety and complexity of rural Mexico and the different strategies that individuals implement to improve their lives – one of which is migration. Nevertheless, the literature on Oaxacan migration has shown its complexity and the variety of results on the locations of origin due to historical and economic circumstances (e.g. Cohen, 2001; Robson and Wiest, 2014; Sandoval, 2016). For example, people in some regions began to migrate before others (see Fox, 2011); while migrants in some locations favoured internal destinations, others favoured international

or circular mobility (e.g. Sandoval, 2016). Similarly, some locations benefited economically from international remittances while others have been described as towns inhabited by children and women (Cohen, 2004). Tama and Tlahui have also shown the discrepancies in the type of migration that individuals undertake and how this key contextual variable eventually shaped the outcomes of *Oportunidades*. If the outcomes clearly differed in two towns that are 14 kilometres apart, including the different impacts between these towns and their hamlets, the influence of *Oportunidades* on migration will also differ between municipalities, Oaxaca and Mexico.

A *third limitation* of this study is that it cannot provide concrete statements on whether *Oportunidades* is contributing or not, in Tama and Tlahui, to its final intended outcome: the breaking of the cycle of the inter-generational transmission of poverty. Although this thesis has explored in-depth the results of the educational component of the programme, the results of other key components such as nutrition and health are not included. Indeed, whether *Oportunidades* reduced poverty in Tama and Tlahui cannot be identified without a conventional survey using panel data in order to compare the poverty indicators of beneficiaries across time. The same would apply for remittances – in the absence of panel data it is hard to know whether or not remittances are reducing poverty in Tama and Tlahui. Nevertheless, a follow-up survey in five or ten years' time would confirm whether or not there has been a generational change.

A *final limitation* of this research relates to evidence from Lindavista and Tejas. This thesis has analysed Tama and Tlahui, where most of the fieldwork took place, in more depth, including beneficiaries' trajectories after the programme to three different cities. In contrast, the findings from Lindavista and Tejas are less robust, because I spent less time in these localities and relied only on focus groups, questionnaires and interviews with key actors. Therefore, the results from these hamlets consist more of broad observations that provide a more general description of the situation there than an in-depth analysis such as that provided for Tama and Tlahui. However, the inclusion of Lindavista and Tejas offered valuable insights into the similarities and differences between the main towns and their hamlets. These differences were not only manifested through their lower socio-economic indicators and structural conditions – the evidence showed that individuals and their households responded to these unfavourable circumstances in different ways, employing other livelihood strategies that, in some cases, were not aligned with the intended outcomes of CCTs. My data also revealed that

the money offered by *Oportunidades* was more likely to create positive complementarities in Tama and Tlahui than in their hamlets because the households' additional income was higher in the towns. In contrast, in Lindavista and Tejas, households relied more on the money from *Oportunidades*, though the transfer was not enough to cover all the expenses of the household.

Independent of these research limitations, different areas for future research exist for each town and both quantitative and qualitative research would be useful to strengthen the existent evidence. In Tama, a topic that deserves more attention and that would contribute to the fields of social protection and migration is the impact of remittances and *Oportunidades* on the reduction of poverty. Although my research has provided insights into how individuals allocate these resources, quantitative research could provide data on the impact of poverty at the household level; Tama provides a unique research setting since remittances originate from internal destinations and the USA. At the same time, qualitative research could offer further insights into why households decided to allocate their income in particular ways and the social meaning they gave to their remittances. My findings showed that these were allocated not only for household consumption but also to increase status and maintain their ties and belonging to the town. More work on this needs to be done.

In Tlahui, it would be interesting to conduct research on the way in which Tlahui responds to the economic and social changes that are already taking place – for example, whether the *cargo* system will be adjusted in a way that enables individuals to participate without sacrificing their professional careers or whether society will continue to preserve its original values. Furthermore, I would be particularly interested in undertaking more research on the paths of these new professionals to their different migration destinations. Although most beneficiaries of this study who migrated to continue into higher education expressed their desire to return, it would be interesting to know if their aspirations turn out to be achievable in Tlahui and whether Tlahui would be able to provide the jobs that its professionals expect to find. This knowledge could help the development of potential solutions that CCTs could offer to those of their beneficiaries who have increased their aspirations and skills and are willing to apply them in their countries and locations of origin. Furthermore, in Mexico, *Oportuniades* recently provided new mechanisms for the 'graduation' of beneficiaries. Further

research is needed to know whether these mechanisms were helpful or not in the transition of beneficiaries to the job market or to higher education.

### **7.5 Implications for the research sites and policy recommendations**

In this thesis I have tried to unpack the influence that CCTs can have on migration decisions while insisting on the importance of the context of the localities where they are implemented. The implications of my findings on the future of Tama and Tlahui are difficult to predict, but they enable me to present the challenges that both towns might face as a result of the increased education of their youths and the types of livelihood that they have been following.

As mentioned, there is an interesting tension in Tama and Tlahui based on how each town understands social mobility and success in both economic and social terms. In Tama, while some parents had been benefiting from the returns of internal and international migration, they were also expecting their children to follow the conventional path to social mobility through education in order that their offspring be assured of a more stable income and a better job than those they themselves had. Nevertheless, other parents were influencing their children – some intentionally, others not – to migrate to work. For youths in Tama, though they have increased their levels of schooling, and *Oportunidades* has contributed to this result, there remains a tension over the choice of path that would lead them to achieve the social mobility they expect, whether they migrate to work or to continue studying. As my data revealed, most beneficiaries in Tama considered education to be important; nevertheless, they have also witnessed how international migrants, and especially the *patrones*, achieved wealth and prestige *without* high levels of education. The *taquerias* offered youths in Tama higher incomes and the proof that different paths to success and learning are achievable beyond formal education.

The implications for *Oportunidades* in a context such as Tama are that, although young people recognise that education is important, they also value other types of learning and jobs that are not necessarily provided by formal education. For them, the *patrones* were able to challenge the socio-economic structures in Mexico whereby education is only accessible for some, and their success has led them to acquiring recognition in Tama. As a result, the *taquerias* offered youths the possibility to overcome their constraints and a route to upward mobility. Therefore, while *Oportunidades* will continue to

improve the levels of education of youths in Tama, the latters' aspirations and the strategies that they employ might continue to be shaped by possibilities that they consider more accessible and realistic, depending on their financial resources.

In Tlahui, a different tension has emerged, as my data in this thesis have shown. While earlier educational migrants have been promoting the value of education in the town, their views contrast quite widely with the ways in which youngsters perceive the value of education. The previous generation not only perceived education as the main path to socio-economic mobility but also considered that the education provided by the state was detrimental for the *Mixe* identity of its young people, disconnecting them from their localities of origin. The discourse around education and the self-managing educational projects that Tlahui created has contributed to the shaping of collective aspirations and a feeling of pride to be *Mixe* and members of Tlahui society. Nevertheless, as my findings have revealed, education has acquired additional meanings for Tlahui youths, who perceive migration for study as the pathway to higher incomes, better jobs, the opportunity to expand their social networks, an increase of their self-confidence, access to Mexican society at a national level and an increase in their prestige in Tlahui society. Although some beneficiaries thought of migration as temporary, others perceived the return to Tlahui and the duties of the *cargos* to be detrimental to the achievement of their personal aspirations.

On the one hand, Tlahui will have to deal with the desire of its young people to migrate and probably to settle abroad while continuing to belong to their town without sacrificing their professional careers. On the other hand, Tlahui will also have to cope when its younger generations aspire to return. These new professionals are willing to contribute their knowledge to the benefit of society but they are also interested in applying their skills and finding jobs further afield than in Tlahui educational institutions.

My data from Tama and Tlahui clearly show the implications of social protection programmes that are designed to reduce poverty in Mexico. Although the Mexican state has promoted the idea that education offers an opportunity to escape poverty, with *Oportunidades* designed to achieve this aim for the rural poor in Mexico, the reality is that a minority – as the official data showed – were able to continue studying after junior- and especially after senior-high school. Although half of all beneficiaries in Tama, and a majority in Tlahui, migrated to continue studying, very few of them were

able to enrol in university or to complete their studies. For those who entered the labour market, having completed senior-high was beneficial but not sufficient to enable them to compete for better-paid jobs which would improve their standing in Mexican society. Indeed, for those who were still studying, the cost of their education sometimes worsened instead of improving their and their families' economic situation.

The economic and social barriers were even higher for beneficiaries from Lindavista and Tejas, who had to take the decision to migrate either to work or to continue studying at a younger age. My data from the hamlets showed that their geographical isolation and the resulting higher levels of poverty and lower levels of education limited the shaping of beneficiaries' educational aspirations and their perceptions of how to achieve them. Indeed, the demographic profiles of Lindavista and Tejas (Table 4.5) suggest that they are becoming elderly populations. Their isolation is motivating more young people to want to migrate, with the exception of females who perceive that their culturally expected duty is to stay and fulfil their gender responsibilities.

It also remains to be seen whether education will lead beneficiaries of *Oportunidades* to better employment or whether they will come up against the class, social, economic and ethnic barriers that did not allow their predecessors to access the jobs and socio-economic mobility they expected. *Oportunidades* and the Mexican state can create the mechanisms and the additional support to enable these youths to achieve their personal and collective aspirations for mobility. From the evidence in this thesis, the following adjustments to *Oportunidades* could contribute to the realisation of these aims.

- Extending *Oportunidades* to higher education levels would be a positive step, however the monetary value still remains very low (\$950 per month) especially considering that the school and living expenses of young people from rural localities increase when they migrate.
- The evidence from Lindavista and Tejas, together with official data, have shown that beneficiaries from these localities began to abandon their education after junior-high due to the lack of financial means to continue studying and to their family obligations to contribute to their household's income. If the scholarships considerably increased in value, young people would have more incentives to migrate after junior-high to continue studying and school drop-out rates could be considerably reduced.



- Facilitating access to other social programmes that would allow youths to find employment and productive opportunities would still not be enough for them to compete for stable employment and higher salaries. My data revealed that beneficiaries also valued technical degrees which would increase their skills in a reduced period of time while enabling them to join the labour market without sacrificing the incomes of their households.
- This research has shown that aspirations, educational and migration experiences are all gendered. Higher amounts of money for women have certainly helped them to increase their levels of education. Nevertheless, after *Oportunidades* women were confronted with norms that prevented them from continuing with their studies or entering the labour market due to their perceived roles as mothers, daughters or wives. Increasing the value of the scholarship for them in higher education would improve their chances to continue raising their educational levels. Greater sums of money should also be allocated to women when they choose to pursue technical degrees. Likewise, increasing parents' aspirations for their daughters can be more effective than merely increasing the money that females receive.
- Beneficiaries in senior-high school felt that there was a lack of guidance, support and knowledge enabling them to access higher education institutions. Although they valued education, not everyone had access to social networks and the first-hand knowledge of how to access universities abroad. *Oportunidades* could contribute by including – in the classes which students attend – professional advice and guidance for the transition to higher levels of education for those who aspire to continue studying.

'*Oportunidades*', as its name implies, should provide individuals with equal opportunities. My research has shown that this is not always the case. Individuals faced economic, gender, ethnic and class barriers that prevented them from creating the lives that they value. Furthermore, their aspirations were also collective, while the design of the programme assumes that beneficiaries pursue only individual goals. However, their aspirations include their families and their communities and therefore their decisions are not taken in isolation. The designers of *Oportunidades* presumed that all individuals in rural localities suffered from the same constraints and that implementation of the programme would produce the same results right across Mexico. My data confirmed that the 'one size fits all solution' produced completely different outcomes because

*Oportunidades* paid little or no attention to the circumstances of the villages and their alternative perspectives on how to attain better livelihoods and social change. This *could* be achieved if academics and policy-makers listened to the experiences of former beneficiaries and created alternative policies that enable people to achieve social and economic mobility according to their personal and collective needs.

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## Appendices

### Appendix 1. Questionnaire in English

Group:	Date:
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This questionnaire takes part of an academic study. It is very important that you honestly respond what you think, since that will help me to get background information and to know the support that young people in your community need to achieve their goals. All the information is anonymous and confidential. Thanks for your participation.

1. Age: \_\_\_\_\_

2. Gender:      1. F ☐      2. M ☐

3. Where were you born?:

\_\_\_\_\_

4. Are you a beneficiary of Oportunidades?:      1. Yes ☐      2. No ☐

5. How many siblings do you have? \_\_\_\_\_

6. How many of your siblings receive Oportunidades?

\_\_\_\_\_

7. Place where you are among your siblings (e.g. the youngest, the oldest, the third):

\_\_\_\_\_

8. Which is the highest school level that any of your older siblings has achieved?

No studies	1
------------	---

Primary	2
---------	---

Secondary	3
-----------	---

High-school	4
-------------	---

University	5
------------	---

Post-graduate	6
---------------	---

Not sure	7
----------	---

Other (specify)	_____
-----------------	-------

**9. Which is the highest school level that your father achieved?**

- No studies 1
- Primary 2
- Secondary 3
- High-school 4
- University 5
- Post-graduate 6
- Not sure 7
- Other (specify) \_\_\_\_\_

**10. Which is the highest school level that your mother achieved?**

- No studies 1
- Primary 2
- Secondary 3
- High-school 4
- University 5
- Post-graduate 6
- Not sure 7
- Other (specify) \_\_\_\_\_

**11. What is the occupation of your father?**

\_\_\_\_\_

**12. What is the occupation of your mother?**

\_\_\_\_\_

**13. The income of your household is:**

- Enough to live 1
- Just enough to live 2
- Insufficient 3
- Very poor 4
- Not sure 5

**14. Do you live with your relatives?** 1. Yes ☐ 2. No ☐

**15. Who do you live with?**

Mom	
Dad	
Siblings	

Grandparents	
Uncle/Aunt	
Cousins	
Shelter	

Other (specify): \_\_\_\_\_

**16.** Do you know anyone close to you living outside your community? 1. Yes ☐ 2. No ☐

**17.** Who and where are they?

Relationship	Place of residence	Occupation

**18.** You are about to finish your school term, what are you planning to do?

1. Continue studying ( go to question 19)
2. Working (go to question 21)
3. Other (specify)

\_\_\_\_\_

Why are you going to take this decision?

\_\_\_\_\_  
\_\_\_\_\_

**19.** Up to which school level would you like to study?

- |  |                  |
|--|------------------|
| 1: Secondary school                              | 4. University    |
| 2: High-school                                   | 5. Post-graduate |
| 3: Technical career or teacher's training school | 6. Not sure      |

Whi would you like to achieve this school level?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**20.** If you are thinking to study university, which career would you choose?

\_\_\_\_\_

**21.** ¿What would your parents like you to do when you are older?

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---

**22.** Do your parents support you to continue studying?

- 1: A lot
- 2: Little
- 3: Nothing

**23.** How much does your parents agree that you continue studying?

- 1: Strongly agree
- 2: More or less agree
- 3: Somewhat agree
- 4: No agreement

**24.** What would you like to be when you grow up?

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**25.** Where would you like to continue studying or working after your current studies?

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**26.** Is there anything that you need to achieve your school or labour goals?

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**27.** Is there anything that we did not discuss or is not covered in this questionnaire that you would like to include?

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## Appendix 2. Questionnaire in Spanish

Grupo:	Fecha:
--------	--------

Este cuestionario forma parte de un estudio académico. Es muy importante que nos digas sinceramente lo que piensas ya que esto nos va ayudar a informar sobre el diseño de mejores políticas públicas así como dar a conocer el apoyo que necesitan los jóvenes de tu comunidad para realizar sus metas. Toda la información que nos proveas es anónima y confidencial. Gracias por participar

1. Edad: \_\_\_\_\_

2. Sexo:      1. F ☐      2. M ☐

3. ¿En qué localidad naciste?:

\_\_\_\_\_

4. ¿Eres Beneficiario de Oportunidades?:      1. Si ☐      2. No ☐

5. ¿Cuántos hermanos/as tienes? \_\_\_\_\_

6. ¿ Cuantos más de tus hermanos reciben Oportunidades?

\_\_\_\_\_

7. Lugar que ocupas entre tus hermanos/as (ej. el mas grande, el menor, el tercero):

\_\_\_\_\_

8.Cuál es el grado escolar más alto al que haya llegado alguno de tus hermanos mayores?

Sin escolaridad	1
-----------------	---

Primaria	2
----------	---

Secundaria	3
------------	---

Preparatoria	4
--------------	---

Licenciatura	5
--------------	---

Posgrado	6
----------	---

No sé	7
-------	---

Otro (especificar)	_____
--------------------	-------

9. ¿Cuál es el último grado que aprobó tu papá en la escuela?

Sin escolaridad	1
-----------------	---

Primaria	2
Secundaria	3
Preparatoria	4
Licenciatura	5
Posgrado	6
No sé	7
Otro (especificar)	_____

**10.** ¿Cuál es el ultimo grado que aprobó tu mamá en la escuela?

Sin escolaridad	1
Primaria	2
Secundaria	3
Preparatoria	4
Licenciatura	5
Posgrado	6
No se	7
Otro (especificar)	_____

**11.** ¿Cuál es la ocupación de tu papá?

\_\_\_\_\_

**12.** ¿Cuál es la ocupación de tu mamá?

\_\_\_\_\_

**13.** Los ingresos de tu hogar:

Son suficientes para vivir	1
Son apenas suficientes	2
Son insuficientes	3
Son muy insuficientes	4
No sé	5

**14.** ¿Actualmente, vives con tus familiares?      1. Si ☐      2. No ☐

**15.** Marca con quién vives

Mamá	
Papá	
Hermanos	
Abuelos	
Tíos	
Primos	
Albergue	

Otro (especificar): \_\_\_\_\_

**16.** ¿Conoces a alguien cercano a ti que viva fuera de tu comunidad? 1. Si ☐ 2. No ☐

**17.** ¿Quiénes y a donde?

Relación	Destino	Ocupacion

**18.** Estas por terminar tu ciclo escolar, ¿qué vas a hacer?

1. Seguir estudiando (seguir con la pregunta 19)
2. Trabajar (pasar a pregunta 21)
3. Otro (especifica)

\_\_\_\_\_

¿Por qué vas a tomar esta decisión?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**19.** ¿Hasta que grado en la escuela te gustaría estudiar?

- |                             |                 |
|-----------------------------|-----------------|
| 1: Secundaria               | 4. Licenciatura |
| 2: Preparatoria             | 5. Posgrado     |
| 3: Carrera técnica o normal | 6. No se        |

¿Por qué quieres llegar a este grado?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**20.** Si piensas ir a la Universidad, ¿Qué carrera elegirías?

\_\_\_\_\_



**21.** ¿Qué les gustaría a tus papás que hicieras cuando estés más grande?

---

---

**22.** ¿Tus papás te apoyan para seguir estudiando?

1: Mucho

2: Poco

3: Nada

**23.** ¿Qué tan de acuerdo está tu padre-madre en que sigas estudiando?

1: Muy de acuerdo

2: Mas o menos de acuerdo

3: Poco de acuerdo

4: Nada de acuerdo

**24.** ¿Qué quieres ser de grande?

---

---

**25.** ¿En qué lugar te gustaría continuar tus estudios o comenzar a trabajar?

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**26.** ¿Hay algo que te haga falta para poder lograr tus metas escolares y/o laborales?

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**27.** ¿Hay algo que no hayamos abordado en este cuestionario o en la dinámica de discusión que quieras agregar?

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**Appendix 3. Total population of Tama, Tlahui, Lindavista and Tejas by age and gender as shown by census (1990-1995-2000-2005-2010)**

	Tama					Lindavista					Tlahui					Tejas				
	1990	1995	2000	2005	2010	1990	1995	2000	2005	2010	1990	1995	2000	2005	2010	1990	1995	2000	2005	2010
Total population	1,748	2,031	2,253	2,372	2,783	914	628	855	670	587	2,187	2,407	2,735	3,246	3,452	593	460	534	464	417
Total male population	865	987	1,052	1,101	1,280	439	300	405	296	275	1,107	1,185	1,320	1,594	1,641	294	232	260	222	188
Total female population	919	1,044	1,201	1,271	1,503	475	328	450	374	312	1,080	1,222	1,415	1,652	1,811	299	228	274	242	229
Total population 0-4	NA	NA	233	187	NA	NA	NA	102	67	NA	NA	NA	305	360	NA	NA	NA	74	57	NA
Total population 6-11	NA	NA	NA	367	335	NA	NA	NA	117	67	NA	NA	NA	449	433	NA	NA	NA	79	71
Total population 12-14	NA	NA	NA	208	230	NA	NA	NA	74	50	NA	NA	NA	274	225	NA	NA	NA	35	29
Total population 6-14	532	572	626	575	565	247	182	248	191	117	674	657	673	723	658	170	118	142	114	100
Total population 15-17	NA	NA	132	NA	220	NA	NA	59	NA	50	NA	NA	243	NA	229	NA	NA	39	NA	37
Total population 18-24	NA	NA	NA	NA	400	NA	NA	NA	NA	80	NA	NA	NA	NA	466	NA	NA	NA	NA	55
Total population 15-24	NA	NA	416	458	620	NA	NA	153	104	130	NA	NA	605	712	695	NA	NA	92	84	92
Total population 15-24 males	NA	NA	NA	NA	305	NA	NA	NA	NA	67	NA	NA	NA	NA	340	NA	NA	NA	NA	45
Total population 15-24 females	NA	NA	NA	NA	315	NA	NA	NA	NA	63	NA	NA	NA	NA	355	NA	NA	NA	NA	47
Total female population 15-49	NA	NA	559	NA	801	NA	NA	187	NA	153	NA	NA	689	NA	954	NA	NA	107	NA	105
Total population 60-130	NA	NA	NA	214	255	NA	NA	NA	72	55	NA	NA	NA	252	291	NA	NA	NA	39	37

Source: own elaboration of data from INEGI (1990, 1995, 2000, 2005 and 2010)



### Appendix 5. Tama and Tlahui, Number of returns per state (2010)

Tama				Tlahui			
Population over 5 years by place of residence in 2010 and 2005				Population over 5 years by place of residence in 2010 and 2005			
Place of residence in 2005	Total	Males	Females	Place of residence in 2005	Total	Males	Females
Total	6,739	3,140	3,599	Total	8631	4165	4466
Total living in Tama	6,293	2,882	3,411	Total living in Tlahui	8367	4038	4329
Total living abroad	223	101	122	Total living abroad	221	91	130
Aguascalientes	3	1	2	Aguascalientes	1	0	1
Baja California	5	3	2	Baja California	5	3	2
Baja California Sur	4	1	3	Coahuila	2	1	1
Coahuila	1	1	0	Chihuahua	2	2	0
Chiapas	3	0	3	Distrito Federal	92	38	54
Chihuahua	2	1	1	Guanajuato	3	3	0
Distrito Federal	77	36	41	Hidalgo	1	1	0
Guanajuato	50	22	28	Jalisco	6	1	5
Hidalgo	2	1	1	México	63	20	43
México	39	16	23	Morelos	1	0	1
Michoacán	4	2	2	Nayarit	1	0	1
Nayarit	1	1	0	Nuevo León	7	1	6
Querétaro	10	6	4	Puebla	12	8	4
San Luis Potosí	8	3	5	Sinaloa	2	1	1
Sonora	10	5	5	Tamaulipas	4	1	3
Veracruz	4	2	2	Veracruz	19	11	8
United States	198	140	58	United States	34	29	5
Other country	1	0	1	Other country	1	1	0
Unknwon	24	17	7	Unknown	8	6	2

Source: own elaboration of data from INEGI (2010)