



CONTRACT WORKERS' PERCEPTIONS  
OF RETURN MIGRATION  
A SOUTH AFRICAN CASE STUDY

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### 1. INTRODUCTION<sup>1)</sup>

South Africa employs large numbers of black migrant contract workers from neighbouring independent and self-governing national states to keep its mines, plantations, factories and homes in operation<sup>2)</sup>. Each year hundreds of these workers retire from their jobs in the common area and return to rural destinations to live permanently with their families. Very little is known of the circumstances which await these return migrants when they pick up the threads of home life in their areas of origin. Moreover, very little is known about the situation migrant workers expect to find upon returning home.

To close this gap in knowledge an in-depth study was undertaken among 350 Durban-based migrant workers to explore expectations and aspirations concerning return migration to their rural areas of origin and withdrawal from wage labour. This study formed part of a larger survey of working and return migrants.

The research addressed itself to the following questions:

1. How do migrants assess their life chances? Do they expect to return home "richer", in the material and figurative sense, than when they set out to work in wage employment? Do they expect to "return for development", that is to introduce a new lifestyle to raise their standard of living or will they merely direct their efforts toward conserving subsistence levels of living? Alternatively, do migrants fear they will become burdens to their home communities upon return?

3.

2. How do migrants view their career trajectories? Do they intend to stabilise in town, that is underwrite the one-way view of migration, or do they visualise their careers as circular in the sense that the return home represents the end-point and culmination of their career paths?

## 2. THEORETICAL PERSPECTIVES

Focus on return migration as an independent field of scientific study is fairly recent (cf Kubat, 1983), and a body of theory is currently being developed. For present purposes two major theoretical points are of particular relevance:

1. the paradigmatic conceptualisation of return migration phenomena, and
2. the relationship between return migration and development.

### 2.1 TWO PARADIGMS OF RETURN MIGRATION

The first point concerns the conceptualisation of the population movements underlying modern migrations and labour exchanges. For present purposes, it is useful to make a distinction between two basic paradigms. According to the first paradigm labour migration movements tend to be continuously circular. The second paradigm depicts migration as an essentially one-way movement. Dependent upon the paradigm employed to explain labour migration, the long-term predictions of the outcome of such movements tend to be distinctly different.

Put very briefly, the one-way school of thought argues that migration

reflects an imbalance of socio-economic and socio-political structures which will, indeed must, eventually be resolved. Thus, for example, rural-to-urban migration is expected to eventually give way to the stabilisation and assimilation of rural folk in urban centres of employment. According to this view, circulatory migration is an exception to the rule. For example, some observers of the Southern African scene state that the local migrant labour system survives only because it is artificially bolstered or propped up by apartheid legislation (cf., Wilson, 1972), and is therefore "unnatural".<sup>3)</sup>

The opposite school of thought argues that equilibrium is extremely rare and population movements will, unless checked and controlled, continue indefinitely (cf., Kubat and Hoffmann-Nowotny, 1981). Migration is a levelling principle, the means of reconciling individual needs and wants at the micro-level and of redistributing unequal access to resources at the macro-level of global society. Therefore, unless checks and controls are imposed upon population movements, migration can be expected to continue indefinitely or at least as long as goods and services are not more evenly distributed world-wide. This second point of view lends considerable support to the idea that circular migration is a strong principle underlying individual motivation and might be more persistent than hitherto expected.

The salience of return migration phenomena differs significantly in the two paradigms. If one-way migration is the dominant paradigm, then return migration is viewed as a residual pattern, an anomaly or the exception to the general rule. (Lee, 1969; Campbell and Johnson, 1976; King, 1978). The dearth of evidence collected on return migration until recently may be attributed to the relative popularity of the one-way model.

On the other hand, if circular migration is accepted as a reference concept, then return migration phenomena are a major focus of interest. Only a thorough understanding of the phenomenon of return can lead to the explanation of migration in its entirety. For theoretical purposes circulatory migration may be considered a special case of return migration in which emigration is originally undertaken in the assumption that the migratory movement will in time come full circle. At the level of the individual the return movement represents the resolution to all prior migratory movements. For the individual migrant the return home may be the ultimate reason for migrating in the first place. The eventual return is self-evident to the circulatory migrant; it is the target which may sustain the circulatory movement for the duration of a migrant labour career (McAllister, 1980).

Observations of international migratory movements to North America have predominantly been conceptualised along the lines of the one-way migration paradigm. Circulatory migration and return migration tend to be considered atypical, that is as contradictions or deviations from the common pattern.<sup>4)</sup> The same applies to rural-to-urban migration in South America.<sup>5)</sup>

By contrast, labour circulation has been the theoretical reference concept most commonly applied to migratory movements in Africa both north and south of the Sahara during the past decades (cf., among other Elkan, 1960; Gluckman 1961; Mayer, 1961; 1980; Kuper, 1965; Mitchell, 1969; Wilson, 1972, Garbett, 1975).

By adopting distinctly different approaches the direct comparability of findings emerging from migration studies conducted in various parts of

the world may have been concealed and overlooked. By the same token, differences rather than similarities between international migration phenomena may have been exaggerated.<sup>6)</sup>

## 2.2 EXCHANGE IN LABOUR MIGRATIONS

The second point concerns the benefits accruing to the main parties affected by the movements of migrant workers: the areas sending migrant labour and the areas receiving it. Typically, sender areas belong to the less developed countries in the world and receiver areas to the more developed ones.<sup>7)</sup> Ideally, labour migration has been viewed as an exchange affording equal benefits to both parties. According to this ideal conception of labour migration, the host area gains urgently needed labour imports at very low costs. The temporary hosting of guest workers obviates additional infrastructural development. Most important from a socio-political point of view, labour-importing countries need not affect any changes to the existing social structure to accommodate the needs of a growing economy. This, assuming that the system of labour migration is flexible and allows for the efficient disposal of surplus labour as required.

By the same token, the ideal view is that the labour-exporting areas gain valuable time in which to restructure their economy to meet their needs whilst simultaneously being relieved of some of the immediate pressures placed upon them. The export of labour is assumed to be a stop-gap solution for survival until such time as the sender areas can develop sufficiently to provide adequate employment opportunities for all their people. The assumption is that the sender areas will eventually be in a position to withdraw most of their labour placed on loan in the more developed areas. It is also presumed that only a small proportion of

the contingent of migrant workers "on loan" will need to be absorbed by the receiving areas and will in due course be assimilated into the host population.

Labour exchanges have also been viewed as a form of development aid to sender areas. In theory, the remittances of migrants accruing to the sender areas and the annual levies payable to the sender areas for the loan of their labour are meant to contribute toward closing the development gap between sender and receiver areas. Whilst on loan, it is visualised that migrants will acquire technical skills and learn modern procedures which on return can be transformed into development inputs. It is also assumed that return migrants will eventually be absorbed by the industrial development occurring in their areas of origin.

Students of return migration have meanwhile exposed this ideal conception of migration (cf., among others: Krane, 1973; Cerase, 1974; Bohning, 1975; 198; Rostoli, 1977; Natrass, 1977; Rhoades, 1978; Slater, 1979; King and Strachan, 1980). The assumptions underlying the exchange between labour-importing and exporting areas have not held as originally conceived. It has been observed that the importation of labour to sustain economic growth as a painless short-term solution has proved a fallacy. Labour in-migration has also placed far greater pressure on infra- and social structures of the host areas than originally imagined. In some cases migrant labour has tended to become stabilised in the host area rather than return-migrating as originally scheduled according to the dictates of prevailing economic forces and policy directives.

A world-wide review of sender areas has revealed that these areas have not been able to catch up with the more developed areas in the world.

The breathing space allowed by the temporary absorption of their surplus labour could not be fully utilised through force of circumstances. Extra income earned by migrants has tended to raise expectations as well as standards of living and levels of production. In some instances developmental inputs have been inappropriate or have been applied ineffectively.

It has also been discovered that the majority of returnees did not receive modern-industrial training in the host areas as anticipated because they were employed mainly in lowly paid, menial jobs. Consequently, return migrants have not come home with innovative ideas and the necessary resources and motivation to propel development in the sender areas. On the contrary, it is estimated that the majority of return migrants resume the more conservative lifestyles they left behind in order to emigrate to greener pastures. Alternatively, it has been observed that the minority of migrants who have made good in their host countries return home to live in islands of plenty amidst poverty. In conclusion, return migrants' assets in the form of remittances or accumulated savings have not had the anticipated effect of improving the standard of living in their areas of origin. The spread-effect of wealth and ideas has been minimal. Contrary to expectations, the less developed areas of the world have not "taken off" in the wake of return migration. In short, "return migration for development" has proved a myth in the view of many migration researchers. Critics of modern migrations, particularly those subscribing to the one-way persuasion, are of the opinion that the costs of migration are greatest on the labour supply side (cf., Bohning, 1975; 1981, among others). However, the costs to labour-importing areas are by no means negligible, consider the socio-economic and socio-political cost of combatting xenophobia (Hoffmann-Nowotny, 1973) and of implementing migrant labour repatriation programmes in Europe

(Rist, 1978), and of enforcing influx control legislation in South African cities (Savage, 1984). Obviously, the question of the feasibility and long-term prospects of labour migration is a complex one involving a large number of socio-economic and socio-political factors and goes beyond the scope of this paper.

### 2.3 THE RESEARCH SETTING: THE SOUTH AFRICAN MIGRATORY LABOUR SYSTEM

Originally conceived as a means of providing labour for its gold mines in the last century, the South African labour system is firmly established. Apartheid policy upholds labour circulation in that it outrules the stabilisation of rural in-migrants in centres of employment (cf., Bell, 1972; Schlemmer, 1972; Lipton, 1980). Contract migrants are treated as "guest workers" and are required to leave their families behind in the area of origin for the duration of their labour careers. Recent relaxations in this ruling cannot be expected to affect but a small minority of migrant workers. However, the increasing number of residential, non-conforming migrants (in the sense of living with their families in town) may be viewed as symptomatic of stresses in the contemporary migrant labour system.

It has been proposed elsewhere (Møller, 1984b) that labour migration has undergone substantial changes since its inception. In particular, the "classical" system of South African migrancy has gradually given way to the "contemporary" one. Classical migrancy characteristically involved migrants spending relatively short periods of time in employment centres to satisfy cash needs and returning to subsistence agriculture between trips to these centres. Theoretically at least, migrancy operating under classical conditions may have distributed the costs and benefits of labour

circulation more equally between labour sending and receiving contexts (cf., Berg, 1965; van Velsen, 1961) than under contemporary conditions. However, in practice, these theoretical expectations may never have been adequately met.

More recently, changing circumstances have transformed the classical pattern of the migrant labour system of South Africa, shortchanging the labour-exporting areas. Major factors involved here include increasing population pressure on rural resources, the rising cost of living, and rising expectations among rural people regarding acceptable standards of living. Under these conditions the contemporary circular migrant is dependent on long- rather than on short-term migration to satisfy continuous cash needs. Some scholars of migration also refer to this type of migrancy as "permanent target migration" (Nelson, 1976), in view of the fact that the targets to which circular migrants aspire are never fully realised or that the targets which are achieved are successively replaced with new ones.

### 3. RESEARCH METHOD

#### 3.1 THE EXPERIMENTAL DESIGN

When exploring perceptions of return migration it was borne in mind that most workers find it very difficult to speak about their retirement unless they are actually in the process of preparing for this phase of life.

In an earlier pilot survey devoted to the discussion of retirement plans and return migration, the majority of the respondents tended to reply in vague, stereotypical fashion. In order to use this response pattern to advantage a projective method was devised which required respondents to react to a standard set of retirement stereotypes cast along the lines of

the cliché responses received earlier. This time round, then, the stimuli were stereotypical and the responses tended to be richer and more varied and were ostensibly expressions of individually held values. In the final version, 11 retirement situations in the form of stories were presented to the subjects for evaluation in pairs, and in the last instance, three at a time. At the end of the presentation, subjects were required to recall all retirement options and to identify the typical retirement pattern in their home area, and to state their personal preference for and rejection of one retirement model, respectively.

The models were presented as the life stories of 11 male migrants who had return-migrated under varying circumstances or were contemplating such a return. The stories were relatively rich in detail and devoid of dramatic turns in order to force subjects to project their own interpretations onto the given retirement situations. The stories were translated into Zulu and a standard version was read to all judges.

For ease of reference each model was identified by the name of its main character. In order to standardise the images projected by different names and to prevent choices being made superficially on this basis alone a single class of names was employed. This category included the names typically given to black rural men who would be of approximately retirement age today. It proved too difficult to standardise Zulu names in this category, so English ones were used. This method of identification of models proved satisfactory.

The models were grouped into compatible pairs to render the task of evaluation meaningful. Care was taken to avoid presenting obvious choices to the

judges. The effects of primacy and recency could not be avoided as the sets of retirement models were presented in a given order. However, these effects were offset to some extent in view of the fact that interviewees frequently requested a review of the entire series of the stories in order to refresh their memories before making an overall positive or negative choice.

### 3.2 DATA ANALYSIS

All choices made in the course of the step-wise and overall evaluation exercise were recorded and subjected to a quantitative analysis. Subjects were required to qualify each choice, thus reactions were obtained to all 11 retirement options in the series. Qualifications were also obtained regarding the typical, and the most and the least acceptable retirement models, respectively. These reactions were subjected to a qualitative content-analysis using an idiographic approach, i.e. assuming all subjects to be essentially identical judges of value. The dimensions which emerged from this analysis supplied a framework which would also allow the data to be classified from a nomothetic standpoint, that is across judges, if so desired. This latter approach was not undertaken for reasons of expediency as it would call for the multiple coding and computer processing of some 3 850 comments, given the large number of stimuli and subjects involved in the exercise. However, the quantification of all the choices of models was thought to suffice as a rough estimate of the relative distribution of the major criteria underlying the choices.

### 3.3 SAMPLING DESIGN AND FIELDWORK

There is no adequate means of estimating the total population of migrant

workers in any metropolitan area in South Africa. Therefore a purposive sample of migrants was selected for the research. South African contract labour working in urban areas is regularly accommodated in bachelor quarters in hostels. Minorities are also found in other accommodation usually as illegal lodgers living with or without their families. Based on the assumption that return migration would be a particularly salient issue for the first category of migrants, the research was conducted with a main sample of hostel-dwelling migrants.<sup>8)</sup> A subsample of residentially non-conforming migrants living as lodgers in black suburbs was surveyed as a control group. A stratified random sampling procedure with replacement was adopted. Fifty occupants of randomly selected beds in six major hostel complexes in the Durban metropolitan area were included in the sample. The control group consisted of 50 migrants lodging in a black suburb to the south of Durban. In all, 350 men were interviewed during the period November 1983 - February 1984. Questionnaire schedules were administered to the respondents by a team of 13 interviewers trained specifically for the task at hand. The questionnaire contained open- and closed-ended questions on topics relating to retirement issues. At the end of the interview session, respondents were subjected to the projective test on retirement images described earlier.

Although the interviews were long, on average between 1½ to 3 hours, there were virtually no refusals once rapport had been established. Reactions to the projective exercise ranged from great interest and delight to tedium and annoyance. It became evident that a substantial proportion of the interviewees regarded the retirement stories as morality pieces, from which they could derive lessons for their own lives. As the exercise was aimed precisely at exploring moral values, this reaction on the part of interviewees

fitted in well with the research objectives.

#### 3.4 SAMPLE CHARACTERISTICS

A brief summary of major characteristics is given in the appendix. The subjects were predominantly Zulu-speaking contract workers originating from KwaZulu, the hinterland of Durban. A minority were Transkeians. The respondents had for the most part received little education and were employed in unskilled or semi-skilled jobs. The majority of the men were longstanding workers and members of pension schemes at work. Only half the men earned wages which compared favourably to the minimum subsistence level. But over half the men stated satisfaction with their jobs. However, a smaller proportion indicated satisfaction with their lives in general. There was evidence of strong rural ties and rural orientation among sample members. The majority of the respondents identified themselves as rural migrants who expected to return to their families and landholdings in the area of origin at some later date.

True to expectations the control sample of lodgers tended to exhibit weaker rural ties and a less pronounced rural orientation, which may partially account for their differential views on return migration as evinced in the survey findings.

#### 4. THE RATIONALE OF THE RETURN MIGRATION MODELS

The retirement models used in the projective exercise were conceived along the lines of Cerase's (1974) typology of return migration which distinguishes between four categories of return: those of failure, conservatism, innovation, and retirement. Cerase's typology applies to the Italian

return migration situation and is based on the one-way migration model, therefore successful migration refers primarily to integration or assimilation in the immigration area, and only secondly to innovative return, which is akin to the "return for development" concept outlined earlier. Conservative return migration typically refers to the occupation of a similar position upon return to that held prior to migration. Alternatively, the situation of conservative returnees may be almost equivalent to that of non-migrants who never left the area. In Cerase's research the returns of failure and retirement were numerically small categories, which were also treated as residual ones for theoretical purposes. Contrary to original expectations, the dominant mode of return was conservative rather than innovative.

For present research purposes it seems appropriate to redistribute theoretical weights in keeping with the circular rather than the one-way paradigm of migration. Thus, it is proposed that returns of conservatism and retirement will dominate and will also tend to overlap in the Southern African situation. Most certainly the return of retirement will be the norm rather than the exception. In the circular model the return of failure can be seen to hold a similar position to that in the one-way model.

Implicit in Cerase's typology of return migration are two major dimensions: success in terms of development (material advancement), and the timing of return. Seen in the light of circular migration it is proposed that these two dimensions inter-relate as follows:

Type of return migration	Significance for the development of the labour-sending area	Timing of return migration in relation to migrant's working career
failure	negative	early/premature
innovation	positive	mid-/end of career
conservatism	negative	mid-/end of career
retirement	negative	end of career

As set out in the schedule above it is apparent that the timing of return is crucial for achieving return for development. Thus returns of failure and retirement occur too early and too late in the life course to exercise a positive development effect. By contrast, return at mid-career holds optimum promise for an innovative development input in the area of origin. The distinction between returns of conservatism and retirement is shown to be largely a matter of the timing of return migration and thus of little importance as far as the development factor is concerned.

Retirement scenarios were constructed on the basis of these types. For present research purposes it was decided to fuse the conservatism and retirement modes of return. Return of conservatism/retirement was portrayed as the exemplary pattern of migrancy under circular conditions. A further distinction was made between the "classical" and the "contemporary" pattern as outlined earlier. Two "failure" models were constructed in which work motivation and health played decisive roles in predisposing toward premature withdrawal from labour migrancy. A number of innovative options were developed. Given the considerable interest claimed by students of return migration and development in this type of return it was thought necessary to explore this category thoroughly. Specific emphases of innovation were modelled on the aspirations of migrants

revealed in earlier surveys in which cane-farming, taxi-driving, and retailing figured prominently (cf., Møller and Schlemmer, 1981).

Finally, two options were included as residual categories: a long-term commitment to industrial work conducive to urban retirement<sup>9)</sup>, and peri-urban retirement on the outer fringe of the metropolitan area.<sup>10)</sup>

The scenarios presented to the respondents are given in full in the appendix. For ease of reference scenarios are identified by the main characters appearing in the stories. In broad outline the main features of each model are listed briefly in Figure 1 in order of their presentation during the interview. For further details the reader is referred to the appendix.

The models were fleshed out in considerable detail to increase ambiguity and thus force the respondents to project their own interpretation and values onto the retirement situations. Details included a vague indication of urban-industrial commitment and timing of retirement in order to test the proposition put forward above that a positive relationship exists between early return and innovation.

The retirement situations were described in neutral terms so that subjects could project their own standards of success. For example, the main characters occurring in the "return of failure" stories were described sympathetically so that their intentions might appear rational and honourable. It was also thought that the implicit equation of success with development in Cerase's typology of return migration might be too narrowly conceived to apply to the South African migration situation. The supposition was made that circular migrants' conceptions of success might be multidimensional and include a number of different criteria. Therefore, it would be important to allow sufficient scope for subjects to define their own criteria of successful return migration.

Figure 1 : Return Migration Scenarios

Set	Identifying name	Type of return	Additional features
1	John	Return of retirement (conservatism): "contemporary" variation	Permanent target migration followed by rural return to subsistence farming.
	Michael	Return of retirement (conservatism): "classical" variation	Intermittent returns between target migrations to town, final return to subsistence farming.
2	William	Return of failure (lack of work motivation)	Premature return to casual rural jobs after loss of job in town, later allocation of own land to subsistence-farm.
	Peter	Premature return (for health reasons)	After recovering from illness subsistence farming on land shared with brother. Meanwhile brother earns a cash income in wage labour.
3	George	Innovative return (community irrigation scheme)	Early rural return to cash crop. Return to town after crops fail during the drought. Second rural return planned in order to develop an irrigation scheme in the rural community.
	Simon	Innovative return (cane farming)	Cane farm left under wife's supervision whilst working in town. Plans to return to supervise farm in order to achieve a profit.
4	Albert	Innovative return (transport business)	Early return after receiving wind-fall. Returnee establishes a substantial taxi business and achieves social prestige but also experiences customer dissatisfaction.
	Edward	Innovative return (retail business)	Informal retailing in town. Return in mid-career to open a small shop. Has expectations of expanding shop.
5	Joseph	Innovative return (artisan)	Return of retirement to employ skills learnt in town despite limited market for artisan services in the community of origin.
	David	Urban retirement	Takes less strenuous retirement job commanding slightly lower wages than in former job. Decides to continue working beyond retirement age for financial reasons. Access only to poor rural resources. Plans to bring family to live in town permanently.
	Moses	Peri-urban retirement (vegetable farmer)	Decision to acquire peri-urban plot on which to grow vegetables for sale prompted by eviction of family left behind on white farm.

## 5. FINDINGS

At the outset it is important to learn that the respondents generally - and the hostel dwellers to a significantly greater degree than the lodgers in the control group, held a positive view of retirement from wage labour. This view is consistent with the circular migration paradigm which presupposes that return migration is the end-goal of the career trajectory. In response to a survey item 88 percent of the hostel dwellers and 65 percent of the lodgers stated that they themselves "looked forward to rather than disliked the idea of retirement".

The retired worker was also seen in a positive light. However, hostel dwellers tendentially projected a more positive image of the retired worker than their lodger counterparts. The stereotype of the retiree projected by the respondents embraced more positive than negative attributes. Positive characteristics included the items: considerate (92%), important (78%), kind to relatives (77%), sociable (74%), pleasant to be with (74%), helpful to others (73%), busy (71%), and progressive (52%). The negative characteristics being: weak (78%), poor (63%), complaining (62%), dependent (60%), and hard to get on with (51%). It is noteworthy that the negative characteristics concern major fears associated with the retirement phase of life which by and large can be overcome in successful return migration. We shall return to this point when discussing the criteria of a successful return.

### 5.1 REFERENCE MODELS OF RETURN MIGRATION

The projective method employed to explore retirement and return migration ideals achieved remarkably good results. A set of rich responses was

generated which yielded a comprehensive evaluation of return migration from a subjective point of view. Most important the content analysis of this rich material exposed the principal criteria underlying this evaluation. Owing to the leeway allowed in the interpretation of the projected models, choices of specific models varied considerably.

It is noteworthy, however, that despite effective differences in choice of models, the criteria underlying the evaluation remained the same for all respondent groups. There appeared to be considerable consensus concerning these criteria so that a very clear picture emerges from the research findings.

The results of the evaluation exercise are given in Table 1.

By far the most acceptable model of migrancy was the contemporary one of permanent target migration (John) rather than the classical type of migration (William) which called only for intermittent periods of time spent in wage employment. The choice of the contemporary over the classical model is indicative of a greater commitment to industrial work for the duration of a working lifetime. At the same time this unambiguous choice endorses general acceptance of the conservative return. The detailed analysis of responses also revealed a small number of "innovative" projections onto this model. It would therefore appear that the criterion of success in return migration commonly applicable to the one-way paradigm of migration may need to be broader in the case of circular migration.

Set	Model	Type of Return	Positive evaluation within set*	Local re-tirement model	Personal preference	Personal rejection
			%	%	%	%
1	John	retirement/conservatism ("contemporary" migrancy)	90 <sup>+</sup>	22 <sup>+</sup>	28	1
1	Michael	retirement/conservatism ("classical" migrancy)	9	3	2	4
2	William	failure (motivation)	46	6	1	8
2	Peter	failure (health)	52	7 <sup>++</sup>	0	6
3	George	Innovation (community irrigation scheme)	33	7	5	5
3	Simon	Innovation (cane farming)	67 <sup>+</sup>	19	17 <sup>+</sup>	2
4	Albert	Innovation (transport)	49	7	13	4
4	Edward	Innovation (retail)	50	6	15	3
5	Joseph	Innovation (artisan)	39 (23) <sup>***</sup>	3 <sup>++</sup>	6 <sup>++</sup>	13
5	David	Urban retirement (retirement job)	4 (63) <sup>**</sup>	2	0	45 <sup>+</sup>
5	Moses	Peri-urban retirement (vegetable farming)	57 <sup>+</sup> (14) <sup>**</sup>	18	13	9
N =			350	348	350	337
* Percentages within sets may not add up to 100% owing to small percentages of ambiguous responses.						
** Negative evaluation within set.						
+ Significantly higher percentages of hostel dwellers than lodgers endorsed these choices. (p < 0,05)						
++ Significantly lower percentages of hostel dwellers than lodgers endorsed these choices. (p < 0,05)						

Conventional models of innovation were also acceptable to the respondents but the range of reference models tended to include agricultural entrepreneurship as well as transport and retailing businesses. The personal preference of the hostel dwellers was clearly in the agricultural/pastoral occupational sphere regardless of conservative or innovative leanings. In view of the hostel dwellers' rural orientation this preference is hardly surprising. The entrepreneurial aspirations of rural migrants may be seen to clash with their real life chances. Rather than run the risks of failing in business or pursuing it halfheartedly (a strong factor in the rejection of the artisan model Joseph), aspirations may be adjusted downwards to match real expectations. The responses to an earlier question in the interview are supportive of this type of interpretation. Exceptionally high proportions of the total sample regarded entrepreneurship and rural elitism as unattractive rather than unattainable values. By contrast, virtually no respondent negated the value of material wealth as such although one in three respondents were doubtful of achieving this value<sup>11)</sup>. Similarly in response to another item, some 71 percent of the respondents stated expectations of deriving retirement income from some kind of small business enterprise, however, only 16 percent thought they would be dependent upon this type of income for their livelihood in future.

Return of failure is generally viewed as unattractive, mainly because it represents a departure from the acceptable pattern of permanent target migration of which John is the prototype.

The reaction to the two residual categories in the projective series is most illuminating. Of all the models in the series the prototype of immigration to the industrial centre (David) is rejected most vehemently.<sup>12)</sup> This

prototype is seen as the complete reversal of all the values held dear which are incorporated into the prototype of permanent target migration (John). Findings are also suggestive that lodgers may have opted for an extended sojourn in the urban areas, where greater formal and informal employment opportunities exist, in order to avoid returning home as failures like some men in their home districts.

The reaction to the peri-urban model was mixed. This model elicited strong positive as well as negative reactions because a number of cross-cutting values were projected onto the model. Focus on salient positive values resulted in the domicile factor being overlooked in a number of cases. Suffice it to say that a substantial proportion of the group which rejected this model equated it with an urban rather than a rural retirement model. That is, members of this response category rejected the model because in their view it represented a deviation from the circular migration pattern.

#### 5.2 REFERENCE CRITERIA OF RETURN MIGRATION

In reacting to the retirement models presented in the projective exercise it was the qualifying comments rather than the effective choices of model which were all-revealing. From the content analysis of these qualifications emerged a set of reference criteria for the evaluation of the successful withdrawal from the migrant labour system.

The dominant criterion values employed in evaluating the return migration models are as listed below:

Rural resources

Land  
Cattle

Rural integration values

Familism:  
    General support, remittances  
    Housing  
    Education  
Service to the community

Work values

Urban-industrial commitment

Retirement status values

Financial security  
Lifestyle (farming versus entrepreneurship)  
Independence  
Rest from work  
Personal prestige

No pretensions are made regarding the comprehensiveness of the list or the rank-ordering of the items. It is also noteworthy that the items in the list correspond to ends as well as means. Thus, work values are purely instrumental whilst rural resources and integration values operate as instrumental as well as end values. Retirement status values are predominantly end values, although financial security is regarded as a means as well as an end. A discussion of these values in greater detail follows.

5.2.1 Rural assets

The rural way of life is held in high esteem and the shrinking value of rural resources is of great concern. For example, respondents conceded that unlike in former times, modern agricultural methods (requiring cash inputs) are

essential in order to achieve good yields from impoverished land. The experience of the recent drought had destroyed the respondents' faith in the value of cattle and agriculture as adequate social security in old age. Nevertheless, a migrant of social worth is required to have land of his own to plough and cattle. In the projective test lack of these status factors consistently tipped the balance in favour of the migrant model which projected greater affluence in terms of access to rural resources.

Land is a fundamental value among circular migrants. Apart from the dominant coercive factors such as influx control legislation, it is this positive incentive to return which has contributed most to the long-term stability of South Africa's migrant labour system.<sup>13)</sup> It is also land factors (e.g. scarcity of arable land, and the derived need to replenish tired land, and work smaller plots and less fertile land more intensively) which have reshaped the migrant labour system in time.

The need for the "contemporary" circular migrant to work continuously rather than sporadically unlike his "classical" counterpart is influenced by land factors.<sup>14)</sup> All other factors being equal, access to land of one's own, preferably a relatively large tract of fertile land, was a decisive factor in evaluating return migration models.

It would appear that references to establishing one's retirement "business"<sup>15)</sup> were frequently meant to include cash cropping and also subsistence farming. Responses to an earlier question referring to the number of retired contract workers who had started small businesses in the respondents' home district regularly included cane, maize and vegetable farmers. The main principle of business is independence, therefore the sharing of land, such as in Peter's

case, is of little value.

It is particularly interesting that land is sufficiently highly valued to justify unconventional means of attaining it. The unexpectedly high rating of the peri-urban return model (Moses) is a case in point. Moses was unfortunate in losing access to a tenant farm. But he is also successful in that he managed to save sufficient money to purchase a peri-urban market garden. Although many doubts were voiced regarding the location, the size, and the cost of this land, not one respondent disputed Moses' right to work land of his own.

In this connection it is interesting that the artisan return migration model (Joseph) is criticised for pursuing an unprofitable business instead of working his land. Access to land, then, is a privilege which must not be misused. Return to subsistence farming, or if one is particularly fortunate or successful, to cash cropping, is a reward of migrant work which, theoretically at least, is attainable for the majority of return migrants. As such, it is the target which sustains circular migrants throughout their working lives.

#### 5.2.2 Familism

The migrant works away from home with his family at heart. Absconders are condemned as are those who squander their savings which rightfully belong to the family at home, or those who invest capital in a business proposition which is not sound. Retirement strategies are planned with the long-term security of the family in mind.

Mindless decision-making and unnecessary risk-taking jeopardise the future of the entire family and are therefore to be avoided. The model migrant works hard to earn a living for his family while physically fit, sends home remittances in regular intervals to support the family and educate the children, and returns to rest in the family home at the end of a working lifetime. Thus, remittances from children are interpreted as signs of personal success and as a reward for providing for children's education and physical needs in the past. All other factors being equal, the returnee who was thought to have educated his children represented the preferential choice among the reference models.

#### 5.2.3 Service to the community

As in many rural communities individualism is regarded as particularly dangerous if it is seen to detract from the common good in any manner. It is thought that neighbourly relations are easily poisoned by jealousy and even witchcraft. Thus, innovations and entrepreneurship must be justified in terms of their utility to the rural community. However, the service criterion appeared to rank after other social integration criteria and certainly paled besides familism values. If the three factors individualism, familism, and community service are weighed against each other, then individualism and familism are ranked on par before community service. The migrant and his family are locked into a mutual dependency relationship and putting self before family meets disapproval. It is assumed that a return migrant who for reasons of poverty or greed continues to work long hours will of necessity neglect his family. Similarly, family interests must not be sacrificed for the benefit of community. Thus, visionaries like George or idealists like Joseph are seen to be culpable of concentrating their efforts on serving their community whilst failing their families.<sup>16)</sup>

#### 5.2.4 Urban-industrial commitment

Urban-industrial commitment is of instrumental value in obtaining rural goods. Notions subscribed to by the respondents, such as "working till pension", "saving for retirement", "thinking ahead" and "planning for one's own business" are all expressions of this instrumental value.

Voluntary withdrawal from wage labour at an early age to return to subsistence farming or cashcropping, or even to establish a rural business is condoned only if a migrant is in a position to be able to afford to retire prematurely. In this case it is a mark of success; the target of migration has been achieved. By contrast, premature return with empty hands is interpreted as personal failure or misfortune. In this case the return migrant is variously considered lazy, unlucky, or simply foolish enough to throw away his life chances. It is noteworthy that not only the return models of failure (William, Peter) were seen in this light, the negative evaluation of the "classical" return model (Michael intermittently interrupted his migrant career to invest in the rural sheet-anchor) was also interpreted in this manner by a substantial proportion of the respondents.

#### 5.2.5 Financial security

The principle of distribution of risk and reliance on multiple sources of income is a strategy common to peasants worldwide to avoid misfortune. Judges agree that the successful returnee must never depend upon a single source of income lest it run dry.<sup>17)</sup> A constant and reliable flow of cash income must be forthcoming to sustain and improve assets which might deteriorate in time. The maxim of "working towards pension"

is a strong factor in permanent target migration. As mentioned above, dread of poverty in late life is expressed in terms of the negative stereotype of the retiree. Capital is required to become a successful retirement farmer rather than merely eking out an existence of sorts from the land. It is considered unwise to place all one's eggs into one basket. Risk factors are to be avoided at all costs. Preference is given to the "slow steady" kind of business rather than to erratic gains and losses. By the same token dependence upon luck (Albert) rather than on honest work and systematic planning may lead to disaster. Over-ambitiousness and single-mindedness are condemned for the same reason. Obviously this type of world view is more conducive to conservatism than innovation or entrepreneurship.

#### 5.2.6 Lifestyle: agriculture versus petty entrepreneurship

Although the successful businessman may be admired and many migrants aspire to petty entrepreneurship (cf., Møller and Schlemmer, 1981:52ff), entrepreneurship is tendentially regarded as an instrumental value rather than an end in itself. Business activities are seen as conducive to achieving values such as financial security, familism, community service, independence, and personal prestige. By the same token, business activities involve such great risk factors that they may also defeat these purposes. Therefore, we detect a certain wariness with which the rank-and-file migrant treats the innovative return models of the substantial business variety (Albert, Edward). Personal preferences, especially among the rurally oriented hostel dwellers, were generally projected on to the agricultural reference models. Judging from this and earlier research petty entrepreneurship is more acceptable as an extra source of income to supplement rather than to supplant subsistence farming (cf., Rutman, 1974).

### 5.2.7 Independence

Independence is an important factor in successful return migration. Withdrawal from labour migrancy affords the opportunity to start one's own business in the broadest sense of the word as an independent farmer, petty entrepreneur, or simply to sit back and rest in order to recover from years of hard work in wage labour. Dependency in its various forms is shunned, in particular financial dependency on family and kin. Co-ownership of a family plot is variously interpreted as dependency. Dependence on external factors beyond one's control, such as climate, acts of God, even the goodwill of business partners and clientele impinge on one's freedom and security and therefore represent risk factors.

However, it is noteworthy in this connection that remittances from children are also seen as signs of gratitude and respect. Similarly, family co-operation in a business or agricultural enterprise is considered a rational means of achieving material success.<sup>18)</sup> Migrants whose families are capable of working on the rural and the urban front simultaneously, such as in the case of Simon, are admired. However, the contribution of the urban partner tends to be considered superior to that of the rural partner. The latter is often assumed to be financially dependent on his urban counterpart (cf., Peter, William). This idea of spreading risks spatially was one of the major positive features of the "classical" migration system which may have persisted in the contemporary system in slightly different form. (cf., Brown *et al.* (1970) for an account of a similar concept of risk distribution involving differential utilisation of family labour.)

#### 5.2.8 Rest from work

The right to return-migrate must be earned. Therefore, its timing is all-important. Although early retirement is favoured it must not jeopardise one's opportunity to accumulate the capital required to invest in one's retirement "business" or reduce the expected flow of cash income in retirement. Thus, it is important to have attained costly goals such as educating one's children and establishing the family house, before taking leave of wage labour.

Investment in children's education is considered particularly important in that it may pay dividends in late life in terms of respect and remittances. Whilst migrants fear a deterioration in their health through lack of physical exercise after leaving wage employment, they would also prefer to conserve their energy in their retirement business. Ideally, the dignified retiree is removed from the hustle and bustle and toil of workaday life. Similarly, peace of mind is frequently cherished over material affluence, a factor which is decisive in weighing the costs and benefits of entrepreneurship. Rest from work and retirement farming are both cherished values which are not contradictory. The successful retirement farmer has plenty of spare time and hires labour to carry out the arduous work for him.

#### 5.2.9 Personal prestige

As references to prestige factors tended to be fairly subtle it is difficult to determine the exact value of this criterion. However, it would appear that regular retirement of say the conservative type (John) carries considerable prestige with it. The conservative return migrant

will have achieved the major goals of migration and can therefore be identified as a return migrant of worth. Over and above this "conservative" prestige, prestige of the "innovative" kind, in particular if acquired through less familiar entrepreneurial activities (Albert, Edward) may only afford status at the price of extra risk. It is also noteworthy that Michael's attempt to ingratiate himself with the community elites is considered futile as this retirement strategy did not increase Michael's access to rural resources nor provide a regular source of income.

Clearly then prestige detached from power is considered of little value. The rural status position must be consistent over all its dimensions. Over-emphasis of one dimension over the other resulting in an unbalanced, uneven status constellation is to be avoided. Negative interpretations of the retirement models in the survey frequently referred to power-prestige imbalances with one status dimension leading over the other one lagging behind. Thus, a power-lead associated with "innovation" holds inherent dangers for the status incumbent of becoming a target of witchcraft, whilst a prestige lead or power deficiency implies lack of fulfilment of migrant values.

#### 6. DISCUSSION AND CONCLUSIONS

The major findings emerging from the evaluation of successful return migration can be summarised as follows:

1. The migrants in the survey acknowledged that financial security provides the key to well-being in retirement. The majority of migrants aimed to spread their risks by investing life savings in a number of income-generating retirement projects. The circumspect

planning of one's retirement projects was viewed as the most essential ingredient in attaining successful return migration.

2. At the outset of the inquiry it was hypothesised that an early return, that is early withdrawal from the migrant labour system, would represent the mark of success among rural-oriented migrants. From a theoretical point of view the early return is also conducive to "innovative" return or "return for development". The research findings indicated a general preference for an early return. However, some reservations were also expressed.<sup>19)</sup> In favour of an early return is the need to develop retirement projects while still physically fit and mentally alert. On the other hand, the study revealed that migrants may be unwilling to risk an early return. According to the survey findings the majority of the respondents expected to derive some retirement income from their pension schemes at work and only a minority expected to rely predominantly on income from agriculture. Therefore, the conclusion lies close at hand that early return of the successful variety must remain a dream for the majority of low-skilled and poorly paid migrant contract workers.
3. Reference was made earlier to the ongoing debate in return migration circles concerning the benefits which accrue to rural communities from the system of labour migrancy. "Return for development" conceptualises the notion of return migrants improving the standard of living in the labour-sending area by introducing modern ideas, skills, and capital, all of which are assumed to be in short supply in their areas of origin. Survey results intimated that the reference model of retirement among labour migrants tends to be "conservative" rather than "innovative".

Labour migrancy is valued mainly for its instrumentality in supporting the traditional pattern of subsistence farming. The prospective "conservative" return migrant becomes a committed urban-industrial worker in order to maximise the returns from his rural assets in later life.

Although this return migration model may reflect a "conservative" approach to successful retirement, it allows sufficient scope for innovation as is evident from the projections onto the "contemporary conservative" return migration model (John). For example, the need to invest in modern agricultural equipment (including mechanised traction to replace animal traction which is either disallowed or subject to risk factors such as drought conditions and disease), seed, and fertiliser, and irrigation was frequently stated. Only a successful return migrant could afford to improve his farming methods to make subsistence farming a worthwhile enterprise.

However, survey findings also reveal that the realisation of innovative tendencies within the conservative return migration model are highly dependent upon the benefits which migrants can derive from their wage labour. Therefore, the low level of confidence in their future financial security expressed by the surveyed migrants, who for the most part belonged to the category of relatively satisfied workers, is cause for concern.

4. Attitudes toward return migration are by and large reflections of the strong rural orientation and value system upheld by the majority of migrants in the survey. Retirement is viewed as being synonymous with re-entry into the rural economy. For the majority of the

surveyed migrants return at the end of the migrant career is self-evident. There is no question of stabilisation in town. This orientation is consistent with South Africa's apartheid regulation of labour migration, which has undoubtedly been influential in shaping migrants' world views.

Inferring from these and earlier results<sup>20)</sup> the circular migration paradigm is the dominant reference model for regular migrants currently participating in the South African system of labour migration. However, a shift of paradigm towards the one-way migration model is detected among a minority of residentially non-conforming and landless migrants, which may be a reflection of emergent strain in the system.

On a more practical note there are signs that adherence to the circular pattern of migrancy is not rigid even among Zulu migrants whose rural resources may be somewhat less strained than those of, say, their Transkeian counterparts. There appears to be considerable scope for the adaptation of the circular model to varying external circumstances. For example, the Zulu migrants in the survey, despite their strong rural ties expressed considerable understanding of and sympathy for unconventional retirement strategies which necessitated relocation to a peri-urban area or even to an urban neighbourhood in order to increase financial security in old age.<sup>21)</sup>

Under present circumstances survey results indicate that the majority of migrants would select the urban retirement option only as a last resort. Strong personal preference is expressed by the majority for reliance on the rural resources of the home base and for investment of life savings in agricultural and related projects. Most certainly the

apartheid system of labour migration reinforces these expectations of return migration among South African migrants. However, the conclusion lies close at hand that continuing pressure on arable land in migrants' areas of origin and landlessness may force increasing numbers of circular migrants to revise their current reference paradigm of migration to match their rural circumstances. As in other countries of the world, South African migrant workers may be forced to abandon the circulatory in favour of the one-way model of migration in order to escape rural poverty in late life.

NOTES

1. This paper is a revised version of one read at the Annual Congress of the Association for Sociology in Southern Africa held at the University of the Witwatersrand, Johannesburg, 2-5 July 1984.  
The results presented here are based on research which was undertaken under the auspices of the National Programme for Environmental Sciences. Views are those expressed by the author, who also wishes to acknowledge financial support from the Foundation for Research Development of the Council for Scientific and Industrial Research.
2. Nattrass (1983:15) cites a conservative estimate of some 1,5 million longer-term migrants.
3. The use of concepts such as "natural" which are studiously avoided by the "hard" school of modern social scientists has a long history in the study of migration and reflects its beginnings at a time when analogies pertaining to social science phenomena were commonly derived from the biological sciences and from natural history.
4. See among other the work of Eldridge, 1965; Hernandez-Alvarez, 1967; Myers and Masnick, 1968; Brown *et al.*, 1970; Lee, 1974; Long and Hansen, 1975; 1977.
5. See Turner's (1970) notion of the stepwise consolidation of migrants settling in South American cities. Exceptional are the viewpoints represented by Feindt and Browning, 1972; Simmons and Cardona, 1972; Guillet, 1976; Conaway, 1977; Laite, 1978. Of particular interest here is Guillet's proposition that South American one-way migration may be more easily reversible than hitherto accepted, and may compare to the South African circulatory pattern.

6. Internal migration is generally subject to the same conditions as international migration elsewhere due to South Africa's apartheid policy. Therefore, South and Southern African migration is appropriately considered as international migration for practical as well as theoretical purposes. From a theoretical point of view the distinction between internal and international migration is by and large artificial (cf., Hoffmann-Nowotny, 1970).
7. Systematic distinctions between the micro and macro-theoretical level of explanation commonly made in the discussion of migration are omitted for the sake of brevity. However, this with the implicit assumption that mechanisms operate in similar fashion on both levels.
8. The arguments underlying this assumption are discussed in greater detail in Schlemmer and Møller (1984).
9. Plotnicov's (1970) idea of failed return or the "rural dream" served as reference for this retirement model. For a full discussion of this model cf., Møller and Schlemmer (1981:98,113-138). Møller (1984a:58) reviews instances where this model was spontaneously projected by black workers discussing their future plans.
10. This model was based on the empirical observations made in an earlier 1982 study conducted by Schlemmer and Møller (1984).

11. Life chances were assessed as set out below in response to a survey item which read:

"Here are some things that are important to many workers. Which of these things do you want and are confident that you will accomplish in your life; do you want but are not confident that you will accomplish in your life; or do you not want?"

<u>Value*</u>	<u>Confident of achieving value</u>	<u>Value undesirable</u>
Marriage payment	84 (87/67) <sup>+</sup>	5 (3/16)
Education of children	72	0
Housing	67	3
Cattle	55	5
Rural return while still in good health	48 (45/64)	9 (10/2)
Small business of own	44	40
Material wealth	34 (27/72)	1
Community prestige position	19 (20/12)	40 (37/58)

N = 350

\* Items are paraphrased for brevity sake

<sup>+</sup> In the case of significant differences between subsamples, percentages are given in brackets for the hostels and lodgers subsamples, respectively.

12. Similarly, only 6 percent of the total sample opted for late retirement with a pension increase in response to a closed survey item presented earlier in the interview.
13. This is argued in greater detail in Møller (1984b).
14. In the negative interpretation of innovative return migration, the cane farmer Simon is admonished for not working until pension age in view of the fact that his land is poor.

15. As used by the respondents retirement "business" refers to any activity which will secure a livelihood for the return migrant and his family.
16. Banfield's (1958) concept of 'amoral familism' springs to mind. In Banfield's view putting the short-term family interests before community interests effectively retarded rural development (cf., also Peabody, 1970, for a critique of the Banfield hypothesis).
17. In this connection it is noteworthy that respondents indicated expectations of multiple sources of income after leaving wage employment including savings (83%), pension from work (85%), state pension (96%), agriculture (86%), small business enterprise (71%), support from children (54%); the main source of expected income being state (old age) pension for the modal category (38%) of the respondents.
18. Similar findings emerged from an earlier in-depth study of retirement images conducted among a small number of black domestic and service workers (Møller, 1984a).
19. This ambivalence is also reflected in the results of the attitude survey included in this study. For example, as noted earlier 85 percent of the total sample looked forward to their retirement from wage labour. Similarly, 57 percent wished to retire while still in good health and active. However, only 48 percent felt confident that they would be able to retire early while in good health and only some 50 percent opted for early retirement in the case of their pension from work being reduced. It is also telling that some 81 percent of the sample stated that it was more difficult for retired workers to survive these days.

A similar ambiguity is detected in the stereotype of the retired worker which is mainly positive but also includes descriptors such as "poor", "complaining", and "busy". A negative interpretation of these latter attributes is that impoverished retirees are constantly complaining about their financial situation and are kept busy earning a retirement income rather than resting from work.

20. Cf the attitudes expressed by migrants participating in nationwide surveys (Buthelezi Commission, 1982; Schlemmer and Møller, 1984).
21. The scenarios described in the retirement situations of Moses, the peri-urban market gardener, and Joseph, the craftsman without a market for his services in the rural areas, are cases in point.

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## APPENDIX 1

## SELECTED BACKGROUND CHARACTERISTICS OF SURVEY RESPONDENTS

	Hostels (n = 300)	Lodgers (n = 50)
	%	%
<u>Age:</u>		
Under 40 years of age	46	42
Over 40 years of age	54	58
	<u>100</u>	<u>100</u>
<u>Home language:</u>		
Zulu	85	90
Xhosa	9	4
Bhaca	4	-
Sotho	-	6
Other	2	-
	<u>100</u>	<u>100</u>
<u>Area of origin:</u>		
KwaZulu	88	94
Transkei and other	22	6
	<u>100</u>	<u>100</u>
<u>Educational attainment*:</u>		
None	19	14
Up to standard 5	58	50
Standard 6 and above	23	36
	<u>100</u>	<u>100</u>
<u>Employment status*:</u>		
Employed	96	80
Unemployed	4	20
	<u>100</u>	<u>100</u>
<u>Occupation*:</u>		
Unskilled, semi-skilled, routine non-manual work	93	78
Skilled work	7	22
	<u>100</u>	<u>100</u>

	Hostels (n = 300)	Lodgers (n = 50)
	%	%
<u>Years worked in town*:</u>		
Less than 10 years	14	12
10-19 years	33	52
20 years and more	53	36
	100	100
<u>Urban rights*:</u>		
Work contract renewable each year	78	100
<u>Monthly wages:</u>		
Up to R200	13	18
R201-R300	46	44
R301 and above	41	38
	100	100
Indicator of positive life satisfaction*:	49	78
Indicator of positive job satisfaction:	62	69
Trade union membership*:	33	18
Membership in pension scheme at work*:	77	26
<u>Marital status:</u>		
Married	83	84
Single	14	16
Widowed, divorced, separated	3	-
	100	100
Married, but wife living separately in rural area*:	96	75
Access to arable land in area of origin*:	94	88
Feelings of insecurity regarding rural land*:	27	10
Regularly purchase maize for subsistence*:	58	45

	Hostels (n = 300)	Lodgers (n = 50)
	%	%
<u>Retirement plans*</u> :		
Expectations of rural retirement	99	82
Expectations of urban retirement	1	8
Don't know	-	10
	100	100
<u>Frequency of rural visits*</u> :		
Fortnightly or more often	29	22
Monthly	51	28
Less often than monthly	20	50
	100	100
<u>Rural-urban identification*<sup>+</sup></u> :		
Rural migrant	95	78
Mobilising migrant	1	20
Immigrant	4	2
	100	100

<sup>+</sup> The survey item read: *Which of the following do you feel yourself to be:*

- A person who is fully of the city whose life and future is in the city
- A person whose real place is in the rural area but who has to work in the city
- A person who is changing from a rural person to being a city person?"

<sup>\*</sup> Distributions differ significantly.  $p < 0,05$ .

54.

APPENDIX 2

EVALUATION OF THE 11 RETURN MIGRATION  
MODELS USED IN THE PROJECTIVE TEST

1. JOHN (Return of retirement/conservatism - "contemporary" migrancy)

"When John was a migrant worker he sent home money regularly to his family in the country. He visited his family on his annual leave and over long weekends. By the time he had reached retirement age he had built a house in the country and had educated his children. John is now retired and lives at his home in the country. He lives from farming, his cattle, his savings, and a pension. His sons who are working in town send him regular payments. Now that John has finished working for good he also has plenty of time to rest with his family and to socialise with his friends."

POSITIVE EVALUATION N = 314

John represents the exemplary permanent target migrant of the modern era. John achieves the major goals which traditional as well as modernising migrants aspire to in terms of rural housing, education for one's children, agriculture, and cattle ownership. Judges are impressed that John has met these needs in the course of a working lifetime and has also managed to save for his retirement. Thanks to this foresight John can afford to operate efficiently as a retirement farmer.

John's retirement strategy is much admired. John does everything "right" and "on time". John invests his savings wisely during his working lifetime and is able to reap the benefits by the time he goes on pension. He duly earns a full rest in retirement for which he is respected by his children. It is also assumed that John's children will secure good jobs thanks to their superior education, and will as a sign of respect and gratitude, provide financial support for their elderly parents.

John's commitment to migrant work meets full approval. By working continuously in his urban job, John secures a pension from the company which employs him. Positive mention is also made of the financial security and independence which John enjoys in old age.

Judges deem noteworthy the fact that John derives his retirement income from a number of sources.

Specific mention is also made of John's industriousness, both as a migrant and a retirement farmer. Similarly, it is noted that John lived up to the migrant ideal and supported his family by remitting regularly while working away from home. In retirement John returns to live with his family and friends after a lifetime of service.

There are some indications that John is a "modernising" migrant. For example, educating one's children, contributing to a company pension scheme, and seeking financial independence from one's children are interpreted as modern aspirations. Furthermore, references are also made to the "beautiful" or "modern" house which John has built for his family.

- *"He is a good example to me as I am a migrant worker. He sent home money regularly, educated his children, and saved a lot of money. Moreover, he persevered for one employer."*
- *"John was a good migrant worker. He knew that he had his family in the country. He built a house and educated his children. Now he has plenty of time to rest."*
- *"He educated his children and planned very well for his retirement instead of depending on government pension."*
- *"Because he served for a long time until he got pension, he had various sources of income e.g. pension from work, old age pension, savings, farming, and his sons."*

NEGATIVE EVALUATION      N = 33

John's rural assets are thought to be poor, hence he is reliant on wage labour. Some few judges doubt if he has access to a plot of his own.

John is criticised for being a selfish man who values individualism and familism over his home community. He shows insufficient interest in local affairs, and as a consequence, receives little respect from members of the community.

As a permanent target worker, it is thought that John may have neglected his family by spending too much of his time working to achieve his life goals.

It is also thought that John might be taking a risk by investing in the education of his children who may not support him in his old age in return.

- *"He has done all the things for the future for his family. But some people don't like people who are progressing. They criticise some other's deeds."*
- *"John was not well prepared because he worked all his life. He never got a chance to be with his family. He only saw them at the end of the year."*
- *"He ignored his farm. He had too much belief in an employer rather than taking an interest in his farm. He was not born in town but he was born in the rural areas."*

2. MICHAEL (Return of retirement/conservatism - "classical" migrancy)

"Michael has had several jobs in town during his working lifetime. Whenever Michael stopped working for one employer he returned to the rural areas for longer periods of time to look after his farm. While he was at home he got to know all the big men in his area and he took an interest in the affairs of his area. By the time Michael finally returned from his last trip to town, he had built a house for his family and had a good-sized field and a few head of cattle. Today, Michael stays with his family permanently and looks after his land and cattle."

POSITIVE EVALUATION N = 33

According to a minority judgement Michael projects the image of the successful early returnee of the "classical" migration variation.

In this positive evaluation Michael upholds rural values. Emphasis is placed on Michael's access to rural resources such as land and cattle. Michael expends time and effort in cultivating rural social contacts and developing his rural resources.

In some cases Michael's short stint as a migrant worker is taken as an indication of successful withdrawal from labour migrancy. It is assumed that Michael will have saved sufficient capital to allow him to become a full-time farmer at an early age.

- *"He owned a farm which he looked after whenever he stopped working. I believe he produced enough from his farm for his family to live."*
- *"He was interested in the affairs of his area and they gave him a good-sized field."*
- *"He is not depending on his children, he is doing properly with farming."*
- *"He thought for his future because he had made relationship with his neighbours. He had enough money to spend having a field and some head of cattle. Now he is permanently in the rural area."*

NEGATIVE EVALUATION N = 314

Michael's retirement situation is interpreted as a "return of failure" (Cerese, 1974). The "classical" migrant career characterised by frequent career interruptions is not seen as conducive to accumulating sufficient capital to meet basic needs during a working lifetime and to providing security in old age.

Michael is judged to be a lazy and unconscientious migrant worker who wasted many years of his life looking into local affairs without achieving results for himself, his family, or his community. Owing to his chequered career as a migrant worker, Michael was not able to save for his retirement and is not eligible for company pension benefits. It is conceded that a certain amount of capital is required to consolidate one's rural position. However, Michael did not remit sufficient money during his working career to educate his children, and to invest in agriculture and livestock, or a retirement business.

Michael is seen to be a poor provider for his family and an unsuccessful retiree. It is assumed that Michael derives little income from farming and also owns fewer cattle than John. By neglecting to educate his children Michael cannot expect their support in old age.

Given the time and effort Michael invested in local rural affairs he should have become a community influential in later life. However, late life sees Michael still practising subsistence agriculture instead of resting as is expected of a successful man of his age. Some judges are of the opinion that Michael's strategy of fraternising with rural elites was misconceived because it did not provide for his cash needs. In late life Michael has no real source of regular income. Land and cattle are regarded as insufficient security, because recently agriculturalists have experienced many problems during four years of continuous drought.

- *"He was lazy. Whenever he stopped working for one employer he wasted his time by returning back to the country instead of looking for another job."*
- *"He rushed to rest at home and to socialise with his friends. Things that didn't pay him even a cent. That's why he had no money to send to his family and to educate his children."*

- *"He was supposed to work hard for certain years before leaving work in order to save enough money before becoming interested in his rural affairs."*
- *"It is useless to become a well-known man in your area instead of working for your future."*
- *"He is not a good person. He is interested in the affairs of other people. He has no children who are working who will give him regular payments. In addition we do not know whether his cattle are of high value."*

3. WILLIAM (Return of failure - on motivational grounds)

"When William was a migrant worker he obtained a job in a large organisation. He found he did not like working for an employer and soon lost his job. William then decided to go back to the country to be a subsistence farmer. He also did odd jobs for other farmers until he was allotted a plot of his own. Today William seldom has much cash but he manages to scrape an existence out of his land for his family. Sometimes relatives who work in town send him money if he has cash problems. William is glad to be with his family all the time and he is able to work independently even though he knows he will never be well off."

POSITIVE EVALUATION N = 160

William projects a positive image of the "classical" subsistence farmer who manages to derive benefits from the rural and urban economy simultaneously (cf Brown *et al.*'s (1970) concept of the stem-family).

William is chiefly admired because he eventually becomes a successful subsistence farmer after leaving wage labour. William is deemed successful in that he secures a plot of land for his own use and becomes financially independent of migrant labour. He is able to support his family from his agricultural production.

The fact that William survived immediately after leaving his urban job by doing casual work for other farmers in his rural area is interpreted as service to the community. Alternatively, William is thought to have served his apprenticeship as agriculturalist during this period, which also earned him the right to acquire a landholding of his own. William's service to the community and his landownership earn him local respect. A small number of judges considers William to be an important person in his rural community.

The fact that William receives regular remittances from relatives working in town is positively interpreted as an exchange relationship. William sends fresh produce to his relatives in town who in turn remit from their wage earnings. William is considered to be particularly lucky to be assured of this regular cash income. Some judges assume that the remittances are invested in the agricultural requisites (seed, fertilizer) which enable William to farm efficiently.

Some few references to William's laziness and lack of urban-industrial commitment early in his career are made. However, William is seen to change his negative image by mid-career when he works hard for his community and proves himself a capable farmer.

Few judges state explicit approval for William's choice of leaving wage labour at an early age. The majority of judges prefer to interpret William's withdrawal from wage labour as involuntary. Sympathy is expressed for William's streak of bad luck which caused him to lose his job in town. However, William is considered to be more fortunate than Peter. In contrast to Peter, William is sufficiently healthy and strong to become a good farmer.

- *"He was allotted a plot of his own plus he is physically fit. If he can use these privileges he is likely to be successful."*
- *"William is a man who helps other people. As a result he was allotted his plot and he practised subsistence farming for his family."*
- *"Although he was too lazy to work in town he tried in his area because he at last managed to get himself allotted his own plot."*
- *"He is able to work independently. His relatives who were working in town used to send him money to improve his farming."*

NEGATIVE EVALUATION      N = 181

William projects a negative image of "return of failure".

It is seen as a sign of failure that William must work for other members of the rural community because he returned from town prematurely without any savings. William is considered to be too young to become a farmer in the sense that he has not managed to accumulate savings during his short spell as migrant worker.

In particular William is sharply criticised on the following grounds: William is lazy; he is a loafer. There was no reason for him to leave his job and thereby forfeit his financial security. He acted irrationally, like a "fool" when he failed to plan for his retirement. Owing to his

premature return he will not receive pension benefits in late life. William had no background as a farmer and no capital to invest in agriculture, therefore he could not hope to become a successful retirement farmer. William is a liability to his rural community: he is financially dependent upon other farmers in the area and on his relatives in wage employment. William is not a real man: he cannot provide adequately for his family and he did not stick with his job in town. Lastly, William is a poor farmer. He cannot farm productively because he lacks the capital to invest in modern agricultural equipment and methods. The judges conclude that there is no point in William owning land if he cannot use it efficiently.

- *"I don't see the reason why he lost his job. If he wanted to improve his farm, money would be involved. I mean he should have worked first."*
- *"The major problem with him is laziness. He is aware that he will never be well off one day. He should have gone back to work in town as he is still physically fit."*
- *"In our language we say 'pumpkins ripen for those who haven't got pots to cook them'. If this was Peter he would have done wonders with his strength and physical fitness."*
- *"He lost his job purposely and returned to the country to be a subsistence farmer without enough capital so he relied on doing some odd jobs and money from relatives."*
- *"He was glad to be with his family but provided nothing for his future with his family."*

4. PETER (Return of failure - for health reasons)

"Peter had contract work in town for some ten years when he fell seriously ill. At the end of his contract he returned to his family in the country to rest until he got better. Peter still felt weak from time to time so he thought he would not be able to get a good job in town. So Peter started to work on the land which he shared with his brother. Meanwhile his brother went to work in town. His brother sent home money from time to time to pay for seed and fertiliser. The farm produced just enough for Peter's family to subsist on. In bad years Peter had to buy maize. Today most of Peter's age-mates still work in town but Peter has decided to stay permanently in the country to subsistence farm."

POSITIVE EVALUATION N = 181

The positive reading of Peter's return migration situation is one of "success despite misfortune".

Under the given circumstances Peter behaves in a rational manner. His case is deserving of sympathy. As a sick man he is entitled to withdraw from wage labour and take up subsistence farming at an early age.

In contrast to William's negative image, Peter is regarded as a clever and courageous man. Under different circumstances Peter would have persevered in his job. In fact, he proved himself a deserving worker by finishing his contract in spite of his illness. Ten years of service is considered reasonably long enough to gain some advantages from migrant work in terms of savings, and disability benefits. Therefore, it is assumed that Peter accumulated sufficient capital to enable him to become a farmer.

The supportive role played by Peter's brother is interpreted in a positive light. Peter and his brother are seen to join forces in a family team which works on the rural and urban front simultaneously.

Peter is judged to be reasonably successful despite his misfortune. He is thought to be financially independent and support his family. Even in bad years he has sufficient cash to purchase food for his family. Peter's

use of modern agricultural methods (reference to purchase of seed and fertiliser) meets approval and is also interpreted as an indicator of success.

- *"If Peter did not get ill he would still be working now like his age-mates. At least Peter is sharing the farm with his brother and he does get money to buy seed and fertiliser."*
- *"Although he was unfortunate he managed to survive. He served for a decade which is better because there is sick-pension plus the pension for ten years service."*
- *"As he fell seriously ill I believe he got his sick pension which was the starting capital in their farming business. His brother added to it by working in town."*
- *"Peter was not lazy, but sick so he tried his best to work hand in hand with his brother which is our custom."*
- *"He fell ill but he didn't forget that he can live by using the soil."*

NEGATIVE EVALUATION      N = 160

Peter projects a negative image of premature return migration for health reasons. Alternatively, Peter evokes the image of the landless migrant.

There are two major dimensions to Peter's negative image: illness and landlessness. Peter is sickly and therefore he cannot pursue a regular career as a migrant worker nor is he capable of farming successfully. As a result Peter loses confidence in himself and loses control over his destiny. Secondly, Peter has no land of his own. Owing to this misfortune he is forced to share a plot of land with his brother. A number of judges maintain that sharing land inevitably leads to conflict. Peter is also seen as the junior partner who may be dispossessed of his share in the land. Alternatively, it is thought that the wives of the two brothers may clash. According to another viewpoint there will most certainly be some differences of opinion regarding agricultural methods.

Peter's misfortune is interpreted along two lines of reasoning. The first point of view is that Peter is unsuccessful, and therefore unhappy, through no fault of his own. If Peter had been healthy he might have achieved

"wonders", as one judge puts it, given his hard-working nature. However, a second sizeable proportion of the judges feel Peter failed to plan for the future while he was still a healthy man. In particular, he should have secured land for his own use earlier in life. Some few judges tend to place the blame for Peter's misfortune on the migrant labour system or on Peter's ignorance regarding the true state of his health.

Peter's lack of success as a return migrant is based on the following criteria: Peter is seen to be dependent upon his brother for cash and land to plough. As an agriculturalist Peter fails to produce sufficient to feed his family. Peter may be commended for using fertilizer. However, there is little merit in improving land which is not one's own. Moreover, at least one judge suspects that Peter employs modern methods of farming under his brother's direction. In sum, Peter has failed to become an independent farmer. And as such, a further judge argues that he is no better off than a migrant worker who is dependent on his white employer.

- *"He did not realise that he was ruining his life by working hard in the contract after he had fallen sick."*
- *"He didn't save money before getting ill. Therefore he failed to work on his land to produce enough for his family instead of sharing with his brother."*
- *"His illness destroyed his future to such an extent that he is now dependent upon his brother. Therefore there is no physical effort he can make."*
- *"When two people are living together they always quarrel over land issues and even neighbours. Therefore Peter will quarrel with his brother and he is wasting his energy when he is fertilising his brother's land. His brother can expel him at any time."*
- *"He is not a real man because he has no land where he can build a beautiful house."*

5. GEORGE (Return of innovation - community irrigation scheme)

"George was a young migrant worker who felt he was making very little progress in his work. One year when George was home on his annual leave he heard of a scheme to grow a cash crop in his area. His friends warned him that he was too young to become a farmer but he applied to participate in the scheme anyway. George worked hard in the scheme and had some good harvests but after five years there was a dry period and his crops failed and he had to return to town. In town George could only find menial work. As soon as the drought is broken George plans to return home to try his luck as a farmer again. He hopes to persuade the leaders in his community to build a dam so that people can irrigate their fields if there is another drought."

POSITIVE EVALUATION N = 114

George projects a positive image of successful early return migration of the "innovative" variation (Cerese 1974).

George is thought to be a dynamic and clever young man whose agricultural ambitions and drive bring benefits for both himself and the rural community. George is not easily discouraged by initial setbacks, and makes good use of his migrant earnings to tide him through lean agricultural periods.

George is seen to be a success both as a migrant worker and as an agriculturalist. Proof of his success as a migrant worker is the fact that George earned sufficient capital to enable him to participate in a cash-cropping scheme when he was still a relatively young man. As an agriculturalist he also achieved good yields from his fields.

George's innovative idea of building a dam meets with approval. This plan will ensure George's future success as an agriculturalist because it will reduce some of the risk factors involved in farming. It is assumed that George will receive the full support of his community when carrying out the dam-building project because his people share his love of farming.

- "George was more successful because he worked hard in the scheme and had good harvests. Only drought made him fail."
- "He was likely to be more successful because he worked hard in hand with the community people."

- *"He was likely to be more successful because he was trying all the way round. He worked in town and when he returned home he grew crops to sell. He didn't become hopeless after the drought but he decided to work in town again and plan how to face this drought in future."*
- *"George's past experience as a farmer has taught him how essential it is to store water for irrigation purposes. He wants the scheme implemented for the benefit of his farming community and himself too."*

NEGATIVE EVALUATION      N = 233

George projects a negative image of premature return migration. The moral lesson is that migrant workers must endeavour to accumulate sufficient capital before returning to subsistence agriculture.

Truth is that George left his job in town prematurely in order to return-migrate to his home area to farm. George is at fault for not accepting the advice of his peers and working in town long enough to save the sum required to capitalise his agricultural project. It is also essential that a farmer has sufficient reserve capital to tide him over the bad years when harvests fail.

Although George's innovative idea of building a dam in his home area is commendable, it is an afterthought born of failure. It is doubtful whether George will be able to gain the confidence of his community leaders if he himself is incapable of putting his money where his mouth is. His proposal to build a dam may be too ambitious and costly to be realised. Even if the dam were built, there is no guarantee that all of George's agricultural problems will be solved. Agricultural enterprise is essentially fraught with risks; and factors other than drought may spell disaster for George's farming the next time round.

George is judged to be a failure as a migrant worker and as a farmer. The fact that George was compelled to return to town after deciding to become a full-time farmer is one indication of failure. The other sign of failure is that George did not manage to secure a better-paying job upon his return to the city. George's stint of farming is considered to have been a waste

of time which could have been put to better use in wage labour. A sizeable proportion of the judges regard George to be lazy in view of his weak commitment to wage labour.

- *"George was too hasty when he decided to become a farmer. He did not notice that "fast climbers" also make sudden falls. I think he should work hard in town in order to become a farmer."*
- *"His age-mates are still working. I think he was wrong. He should have worked first like the others rather than becoming a farmer."*
- *"George could not stand on his own, he even asked the community to help him in building the dam."*
- *"Instead of working hard accumulating capital he switched over to become an unsuccessful farmer. They should've built a dam prior to tackling his project."*
- *"He returned to town after having experienced a heavy drought. It sounds like he hasn't arranged his things well in order to become a progressive farmer."*
- *"Drought is a national problem which is not easily solved by an individual person. George has no savings even to buy an engine (to pump water) which is used by farmers."*

6. SIMON (Return of innovation - cane grower)

"Simon worked in town while his wife looked after his farm on which he grew sugar cane. Simon sent home money regularly for the farm. His wife was a very good supervisor but the farm still did not show a profit. After twenty years of work in town Simon was still a strong and active man. He then decided to return home to his family and to work as a full-time sugar cane farmer although most of his age-mates were still working in town. He used all the money he had saved while working in town to improve his farming. Today Simon hopes to make a profit on his farm because he is there to supervise it."

POSITIVE EVALUATION N = 233

Simon projects a positive image of innovative return migration in mid-career and of working on both rural and urban fronts simultaneously.

The interpretation of the retirement strategy underlying the positive reading of Simon's image is as follows:

From the outset Simon worked consistently toward his target. He wished to develop his rural resources. Therefore he worked for a longer term in wage labour in order to accumulate capital and qualify for a company pension. Simon succeeded as a migrant worker therefore he is entitled to withdraw from wage labour. He is now in an excellent position to farm productively.

Simon started his agricultural project early in life while still working in town as a migrant. By the time he retired he was an experienced farmer. Under Simon's personal supervision and with the improvements made possible through his life savings, Simon's farm is sure to become profitable. In any case, the prospects for sugar cane farming are usually very good.

Simon is to be commended for remitting regularly to support his family and to improve his agricultural business.

Simon's wife plays a key role in assisting Simon to become a successful cane grower. She acts as the caretaker of Simon's rural interests. Simon and his wife operate as a "team" or "business partners". Simon's wife can

be described as "clever", "intelligent", "industrious", "competent", and "reliable". Although Simon's farm is not showing a profit under his wife's management, it is also not draining Simon's financial resources.

Simon's early return from labour migrancy is a sign of his success in town which in turn will lead to his being equally successful upon returning to his rural home. Being a youthful farmer he will have plenty of drive and energy to supervise his farming operations optimally. (It might be noted that one judge who gave a positive reading of Simon's retirement strategy questioned whether it was realistic to assume that a return migrant with twenty years service in town would still be youthful.)

- *"There is a lot of money in sugar cane. His wife failed to manage the farm productively, but as he is there personally, he is likely to be more successful."*
- *"He planned for his farm because he worked first to save money to improve his farming. And supervising your farm without enough money is useless."*
- *"He tried to kill two birds with one stone because he worked in town, meanwhile he was working his sugar canefields."*
- *"Simon was working in town while his wife was supervising the farm, which means when Simon decided to go to the farm he found his farm more or less in good shape to take over."*
- *"Simon was sending his wife money and the wife was supervising the farm. When he returns home he will make a profit out of it because he will be helped by his wife who knows the farm as a supervisor."*

NEGATIVE EVALUATION      N = 114

There are two major lines of reasoning underlying the negative interpretation of Simon's return migration strategy.

Firstly, assuming that Simon's wife was indeed a good supervisor and the farm was operating at a loss, the soil was most likely poor or unsuitable for growing sugar cane. Simon was foolish to continue subsidising what would remain an unprofitable operation in the long term. If the land was indeed infertile, his personal supervision would not increase the profit margin substantially. Therefore, Simon was foolish to leave his

city job while still young and fit to work. By retiring early he stood to lose his work pension and a regular source of cash income to supplement his retirement farming.

On the other hand, assuming Simon's wife was an incompetent supervisor or misused his remittances, Simon should never have waited twenty years to set things right. He was wasting his time working in town and lost his savings in the process. Some judges feel that Simon acted as a selfish man. He placed an unfair burden on his wife and should have been more self-reliant as an entrepreneur.

Both readings of Simon's return migration strategy agree on one point. Farming is a hazardous undertaking and Simon may be ill-equipped to cope with agricultural problems. His farming experience is second-hand and he will most likely have insufficient funds to carry him through a period of drought.

A minority view is that Simon has invested his life savings in a hazardous business and even if he succeeds at this stage in life he may be too old to enjoy the fruits of his labour.

- *"He sent home money regularly only instead of visiting his farm to find out what's going on."*
- *"He did not have a proper plan to guide his crop. He left all the work to the wife who knew nothing about farming."*
- *"Depending on another person to supervise your farm, it is hopeless."*
- *"Simon had no predilection to succeed as a farmer. That he sent money to his wife as his field supervisor does not qualify him as a farmer although his wife is said to be a good supervisor."*

7. ALBERT (Return of innovation - transport business)

"Albert worked in a small firm for seven years. He placed a small bet on the races and won a fairly large sum of money. He combined his savings with the money he had won and bought a van. He used the van as a taxi to bring passengers to town from his home district and back. Today Albert has several taxis and has built a modern house in the country. Albert is respected by some people in his community but others think the fares he charges are too high for the people in his area who are not wealthy."

POSITIVE EVALUATION N = 171

Albert projects a positive image of innovative return migration.

Albert's case represents a clear-cut success story. Albert is regarded as lucky in that he became wealthy after spending only a short time in wage labour. He acquired a substantial sum of money with very little effort on his part. Judges intimate that betting relatively small sums on horses is an acceptable means of achieving wealth. Once Albert met with luck, he acted prudently and planned his business well. A taxi business is considered to be a sound investment. The fact that the business is expanding, and that Albert has built a modern house for his family and is respected in his community are all signs of his success and receive favourable mention. Albert is also seen to provide well for his family. Albert's business achievement is also of service to his community. The fact that some of his passengers complain about fares is not taken seriously. Consumer dissatisfaction is simply one of the hazards of the taxi business. The conclusion is drawn that a person like Albert who is financially secure and respected in his community cannot but be a happy man.

- *"He didn't struggle very hard and he didn't fail to plan for his lucky money."*
- *"This man is lucky and he has improved his luck by buying a van he used till he had taxis."*
- *"He placed a small sum and he won. He bought a van to transport people. He built a modern house and he is the wealthiest man in his community."*

- *"He is happier because he is respected by some people in his community; even those who are complaining about the fare won't stay without taxis. They will soon change their minds."*
- *"He won the big amount in the races. He bought a van. As his people complain this is a usual thing. People always have complaints."*

NEGATIVE EVALUATION      N = 175

According to the negative interpretation Albert's success in life is considered unstable, because it is based on luck rather than on hard work. Albert's fortune may disappear as quickly as it came. Some judges categorically disapprove of gambling, while others stipulate that Albert would have been better off if he had continued to work in the migrant labour system in order to accumulate reserve capital and qualify for a work pension.

The complaints of Albert's passengers are taken very seriously. They are seen as an indication that Albert is not providing a good service to his community and is also a poor businessman. Judges draw the conclusion that Albert fails to supervise his business operations adequately. Albert is not attuned to the needs of his clients, therefore his customers may decide to take their business elsewhere. Some judges argue that private transport does not represent an essential service, therefore Albert's clients may boycott his business altogether.

In general, the taxi business is seen as a costly and hazardous undertaking. Judges cite examples of overheads including the cost of petrol and oil, the wear and tear to vehicles driven on poorly surfaced country roads, servicing and repairs to vehicles, the hiring of reliable drivers, and the cost of complying with government regulations. Moreover, there is stiff competition in the business. Taxi-drivers are exposed to many dangers. They may be involved in road accidents and stand to suffer abuse from passengers. Therefore, Albert's business provides little financial security and even his life is at risk.

- *"Relying on a lucky day is hopeless and now he is failing to supervise his business because he is failing to think for the people."*

- *"Easy come, easy go." He jumped from the floor and skipped from the chair onto the table. When leap-frogging, a downfall is possible."*
- *"He has a good start but he has no savings and he has no pension. Then his people are dissatisfied with his fares. This means that he will meet competition from other taximen."*
- *"As some people are complaining about charges, this idea can vibrate throughout the whole community and they can go on strike, boycotting his taxis. This is not a basic need, they can live without transport. Therefore he is not secure."*
- *"Some people are complaining of being overcharged inspite of his having brought to them a good service. Breakdowns, wear and tear, loss of part of his takings through theft etc. must give him a persistent headache."*
- *"It is very expensive to service your taxis and drivers of your taxis may misuse your money. People are complaining about taximen's conduct because they take their wives. You may have many enemies."*

8. EDWARD (Return of innovation - retail business)

"Edward was a worker who bought and sold things to his workmates to make some extra money while he was working in town. Before Edward reached pension age, he withdrew his pension payments and left his job in town. With the money from his pension payments and the savings from buying and selling he managed to open a very small shop in his home area. Edward hoped that in time he would be able to turn his shop into a regular tearoom. Today Edward is still young and feels he has enough energy to make a success of his business venture."

POSITIVE EVALUATION N = 175

Edward projects a positive image of innovative return migration.

The positive reading of Edward's case is as follows: Edward's achievements have been realised through hard work and systematic planning rather than a mere streak of good luck. Edward is regarded as an enterprising person who supplements his wage earnings with income derived from informal retailing. Edward is a committed urban worker who has earned a company pension. The fact that Edward is in a position to pool various types of financial resources to capitalise his retirement business receives favourable mention. Edward's investment is considered sound. Edward worked himself up in the retailing business. Therefore, he has a thorough knowledge of the trade and has experience in dealing with customers.

According to the scenario projected by the judges Edward manages his business well. His shop is popular and provides a useful service to the people in the district. The customers are satisfied with the prices of the commodities sold in Edward's shop. Edward is confident that business will improve and he intends to expand his shop. Moreover, Edward deals in foodstuffs and similar commodities which are basic needs. Therefore, Edward can be certain of regular customers in his shop and he need not fear competition from other traders. All these factors are taken as a sure indication of a successful business undertaking.

Furthermore, Edward's optimistic outlook and his youthfulness are viewed as attributes which enhance his personal well-being and may also be conducive to his success in future. It is also thought that Edward's

business will provide security for his children.

- *"He is well experienced about the possible difficulties which may arise as he worked hard for his success."*
- *"He has combined three payments, his pension, his salary and his extra-money which he accumulated by selling commodities to others. He has started his business and it is growing."*
- *"Because his aim was to be self-employed in future he planned to do something in order to have extra money and at last he's happy because he's successful."*
- *"He is one of the useful men in our community because he thinks about business. This is because he opened his small shop."*
- *"I think his business prospers because his customers are completely dependent on his shop. They can't live without food."*
- *"He always plans in advance. One feels Edward knows what his people need most. The fact that he already thinks in terms of enlarging his small shop to become a tearoom is a pointer that he knows and foresees a stable market."*

NEGATIVE EVALUATION      N = 171

According to the negative reading of Edward's case history, Edward is relatively less successful and therefore less happy than Albert, the taxi operator. This evaluation is based on the following arguments:

Edward had to work relatively hard to become a small businessman. Moreover, his ambition to become a substantial businessman is mere speculation which has yet to be realised, whereas Albert already qualifies as a wealthy entrepreneur. Assuming that Edward worked until the normal retirement age and then set up his small shack shop, his career path conforms to the regular pattern and hardly bears comparison with Albert's dramatic rise to fortune.

Edward's success as a migrant worker is also questioned. Edward may have been forced to supplement his regular income with informal sector work because he was employed in a menial job and earned very little money. Throughout his life Edward may have worked so hard that he found insufficient time to rest properly and to be with his family.

Regarding Edward's prospects in future, a number of judges maintain that running a shop is a complex undertaking. There are many risk factors involved, possibly more than in the transport business. Therefore, Edward is unlikely to achieve his goal of expanding his business.

Edward is also seen to enjoy little financial security. Edward put all his eggs into one basket when he invested everything he owned in his business venture. If the business fails, he will be left with no income at all.

- *"Edward is not yet as successful as Albert. His shop is equivalent to Albert's van. Albert's fleet of taxis is equivalent to his tearoom which is not yet existent as he hopes to turn this shop into a regular tearoom."*
- *"He is not happy at all, because he is still worried about how he can convert his shop into a tearoom."*
- *"He was a plain labourer who worked hard for his future plans. He was owning a very small shop."*
- *"He can't depend on his small shop because anything might happen. The shop can be burnt down or things inside can be stolen."*
- *"His small shop may not be a success after having used all his pension and savings."*

9. JOSEPH (Return of innovation - artisan work)

"Joseph worked in town all his life. In his last job Joseph managed to learn some useful skills. When Joseph retired at the age prescribed by the factory where he worked, he spent most of his savings on tools so that he could set up a small business repairing things for the people in his area. Today his business does not bring him very much income, because the people in his area are too poor to pay much for his services. Nevertheless, Joseph is glad to be able to put the skills he learnt in town to good use. He also feels he is providing a service in his home community. Also Joseph does not wish to farm like most of his age-mates because he has had little experience as a farmer and enjoys his repair work more."

POSITIVE EVALUATION N = ca 138

Joseph projects a positive image of innovative return migration and service to the community.

Joseph impresses in that he learns a trade while working as a migrant in town which he later puts to good use in his home community. Positive mention also refers to Joseph's proven ability to save, his long service in industry which secures him a work pension, and his financial security.

Joseph's trade provides him with an income which is independent of agriculture. Therefore, he is regarded as an innovator who introduces progress into his rural community. It is assumed that Joseph remains in his home area by choice in order to provide a much needed service to his people. However, it is thought that if he were to move to another area to ply his trade he would become a wealthy man. Therefore Joseph's decision to stay in his home area to help his people is indicative of selfless idealism.

It is also assumed that Joseph draws sufficient income from various sources to provide adequately for his family, and in future his children will inherit his business.

- *"Joseph was not working only for income but even learned useful skills which are helpful to the people of his area."*
- *"Joseph will never be stranded. Anywhere he goes he can make use of the skills he learnt while working in town."*

- *"He obtained a highly skilled job for tools repairing. It was his trade. Trade is a very important thing to a man. No one takes that knowledge away from him."*
- *"We want people who learn skills in towns and come back to help their people. We are always interested in profit but our community should be proud of its members who solve its problems."*
- *"Joseph was trying to bring light into his area."*
- *"I don't like people who are profit-oriented such that they leave their people and go where they will make greater profit. This means that their people will stay without help."*

NEGATIVE EVALUATION N\* = ca 79-212 (\*See footnote p. 81)

The negative reading of Joseph is that he is a stubborn fool rather than an idealist. His innovative return migration strategy is criticised on the following grounds.

Firstly, Joseph lacked foresight and sound judgement. His skills and knowledge were of little use to him because he did not apply them correctly. The judges are agreed that there is little point in starting a business which is doomed to fail. Joseph unwisely invested all his savings into the one retirement project which was to be his single source of income after his withdrawal from wage labour. He also made an incorrect assessment of the local market situation in his home area.

A second viewpoint is that Joseph was an ambitious man who put his own welfare before that of his community or his family. According to this reading Joseph was a status-seeker who was more interested in the prestige aspect of his new occupation than its practical value. Joseph thought himself to be a cut above his own people who were simple agriculturalists. In a similar vein, some judges characterise Joseph as a lazy person who was unwilling to take up farming like his age-peers in his rural community. A number of judges argue that Joseph provided the people in his home area a disservice by introducing a service which was beyond their means. Therefore Joseph is guilty of imposing inappropriate development standards on his people. Joseph is also seen to have pursued his personal ambitions at the cost of his family's welfare. Joseph is thought to have failed to make adequate provision for his family.

Lastly, Joseph is criticised for his stubborn attitude and inflexible thinking. Seeing that he could not gain sufficient support for his business in his rural community, he should have moved elsewhere or should have learnt a new trade. Some few judges recommend that Joseph ply his trade in the urban areas where the standard of living is higher than in his home area.

- *"He knew that the people of his area are poor but because he was too lazy to do farming, so he failed to help himself sufficiently."*
- *"He should have realised that his community was poor and should not have wasted his money buying tools for repairing things for them."*
- *"Joseph learnt useful skills but he was too lazy to think where to use them. Country people have no money. He should have opened a business in town."*
- *"He was interested in having a business but not in what he earns out of it. He opened the wrong business for the wrong people at the wrong place and time."*
- *"He tried to force expensive skills onto his poor people. As a result his business collapsed."*
- *"He did not think much for his family. He worked for his community but gained nothing because it was poor."*

\*Numbers of cases are approximations. Three retirement models were subjected to evaluation simultaneously. Comments pertaining to the medium-preference model contributed mainly to the negative evaluations summarised here.

10. DAVID (Urban retirement - retirement job)

"David worked in many jobs and in time he was satisfied with the money he was earning and managed to save a bit. But as David got older he felt the work he was doing was too strenuous and he found an easier job which did not pay quite as much as his previous job. Soon David will reach pension age. However, David does not wish to retire just now. He wants to stay on in this easy job because he has regular payments to meet. Also the land in his home district is not very good. David visits his family at his home regularly every month or every second month. He sends or brings home substantial amounts of money to his family. He hopes eventually to bring his family to live with him permanently in town."

POSITIVE EVALUATION N = ca 14

In the positive reading of David's retirement strategy the emphasis is on financial security and provision for the family.

Very few judges gave a positive evaluation. The main points were as follows. David sought financial security in old age and his only option was to work in town beyond retirement age. He valued his health over material wealth and tried to preserve it by changing to a lighter but less lucrative job. He cared for his family and planned to bring them to town because his rural resources yielded insufficient income for them to live comfortably. Despite earning less money in his retirement job he managed to remit relatively large sums of money to his family.

NEGATIVE EVALUATION N\* = ca 221-336 (\*See footnote p.81)

David projects a negative image of the rural-migrant-turned-immigrant and the migrant-absconder. David is criticised most severely for rejecting migrant worker values. In particular the following issues are raised.

David is characterised as a lazy worker who is not willing to work hard to support his family. The manner in which David pursues his career makes a mockery of migrant values. David fails to work hard while he is young and strong. As a consequence he manages to save very little. He turns over his jobs rapidly, therefore he does not qualify for a company pension. He commits himself financially late in his working life so that he has not paid off his debts by the time he reaches retirement age. He also fails to plan for a retirement project which will secure him an alternative source of income when he retires from wage labour. Worst of all, he refuses to go on pension on time and to return to his family in the rural area. Instead, he calls for his family to join him in town.

David does not have the makings of a real man. He is not willing to take a man's job. He is also a poor provider. Through lack of foresight on his part his family may starve. He is thought to do his family and his people a disservice by leaving the rural areas permanently. The cost of living in town is higher than in the rural areas and he will have greater difficulties in feeding his family. The quality of life is also poorer for families living in town.

David is also seen to be unlucky. His land is poor and his health is failing. However, these disadvantages are considered insufficient excuses for his poor performance as a migrant worker. David should have persevered in his hard but better-paying job in order to provide for his family rather than seek a demotion. Some few judges recommend that David should attempt to improve the yields of his fields by employing modern methods of farming. Alternatively, he should shift to another rural area to secure a better plot of land rather than settling in town permanently.

- *"David did not think of his family. He only thought of himself in that he did not want to do hard work."*
- *"He does not want to think about his future. He wants to depend upon the white man. He does not save to start his business."*
- *"He is a bad example to us as we are the migrant workers and he is an immigrant. It is not a good thing to be confused by the luxurious life in town."*
- *"He is not an important man because he wants to work until he dies and he is not prepared to return to his land."*

- *"We want to move from town to farm as farm life is better, but David is doing just the opposite."*
- *"David wants to go with his family to town. Children in town have no respect and things are very expensive."*
- *"Children need fresh food. Where is he going to get fresh food from the land, as markets supply old vegetables."*
- *"Grandchildren must know the graves of their grandfathers. David is taking his children to town where they will not know the graves of grandfathers."*

11. MOSES (Peri-urban retirement - vegetable farming)

"Moses lived with his family on a white farm when he was small. When Moses' parents died the white farmer gave the land his family was living on to another tenant and Moses was left without land. At that time Moses was working in town and was about to reach retirement age. So Moses decided to use his savings to buy a plot of land from a person who had land to sell on the outskirts of the city. Today Moses grows vegetables on this land and sells them to people living nearby in the townships or in the shack areas."

POSITIVE EVALUATION N = ca 198

Moses projects a positive image of innovative return migration. He is identified as an agricultural entrepreneur who also overcomes the problem of landlessness.

In the positive evaluation Moses' career path is interpreted as follows:

Moses is considered unfortunate to have been born a tenant farmer and then to have lost his parents and his land-base on the white farm where he was born. Tenant farmers are classified as a disadvantaged category of migrants. By the same token Moses is highly regarded for overcoming his original disadvantage through initiative and hard work. Moses manages to save enough from his earnings to buy a piece of land and uses this land efficiently to produce vegetables for sale.

Moses is regarded as a successful migrant worker. He proves himself capable of saving the sum required to purchase his plot of land in a relatively short period of time. Assuming that Moses, like all tenant farmer migrants could only embark on his migrant career at an advanced age, he would have had to work extra hard to accumulate the capital required for his retirement business. In some instances, Moses' upward mobility is described in terms of a rise from rags to riches.

Moses is seen to be financially secure. As a landowner and businessman he is self-reliant. His agricultural project will bring in a regular income. Moses is producing a crop which is easy to market. His past

experience as a tenant farmer will serve him well in his new role as market gardener. Some judges also assume he will receive a company pension.

Most important Moses has proved he is a man by using the means at his disposal to acquire land to cultivate after retiring from labour migrancy. There appears to be little concern for questions related to tenure and location. At least, the judges who give a positive reading of Moses' retirement strategy make no special mention of these factors.

- *"Although he was left by his parents very young, he proved himself to be a man. He bought his own land and he is making his living."*
- *"Despite the hardship of being homeless and landless he managed to make a good start in business."*
- *"He started to work late but he managed to save money and buy a plot which is very helpful to him."*
- *"Moses was brave and a very promising man. Having been kicked off the land, he bought another plot of land with the money he had withdrawn from his pension payments."*
- *"He owned his plot of land and I think he can run it smoothly as he grew up under the oppressive rule of a white farmer. Therefore, I believe he gained a lot of experience about farm management."*
- *"Although he was working in town he didn't forget his suppressed family on the white farm. After confiscation, he managed to buy a piece of land for his family."*
- *"He is like the man who opened his small shop. By growing vegetables and selling them to other people, you are helping your family as well as your community."*
- *"I like Moses' idea not to go away from country life. Instead he did the best thing by having his own plot and growing some vegetables to sell as his income."*
- *"He knows that our future does not always come from our original places. He bought his land and he is growing vegetables which he sells to his people and he is making a profit."*

NEGATIVE EVALUATION N\* = ca 50-152 (\*See footnote on p.81)

Moses projects a negative image of the landless migrant worker. As such Moses attracts sympathy for his misfortune rather than criticism.

Moses is seen to be unlucky. From the outset his life-chances were poor because he grew up on a white farm. As a tenant farmer he would not have received any education and he would only have been able to enter wage employment much later than other categories of migrant workers. He was forced to spend all his savings in order to purchase land of his own after his family was evicted from the white farm. Therefore, he will have to continue to work very hard beyond retirement age to make a livelihood whereas other migrants will be able to rest and enjoy the fruits of their labour.

Some few judges criticise Moses' reactions to his life situation as follows:

- Moses should have foreseen that his land-base on the white farm was insecure and should have relocated earlier in life.
- Moses should have remained in wage employment until he reached the normal retirement age, rather than taking early pension to become a market gardener and jeopardising his financial security in late life.
- Moses was unwise in buying a plot in a location close to town or to a shack area. The urban/shack environment is not a suitable one in which to raise children and there will be strong competition from other entrepreneurs in the area. Moreover, Moses' plot might be overtaken by the expanding metropolitan area. Relocation to a tribal area might have offered Moses more advantages.
- Some few judges fear that Moses, the businessman, will be interested only in making profits and not in serving the community.
  - *"Moses did not get a chance because he had worked for a white farmer. When he worked in town he had nearly reached retirement age."*
  - *"Moses is poor. He did not get a chance of going to school or of obtaining land when he was still grown. He must start saving so he can obtain land."*
  - *"This is a sad story. White farmers are no good. Moses used all his savings to buy a plot. Moses is still growing vegetables to sell to the people nearby instead of having a rest."*

- *"He wasted his time living on the other person's land and later on in his old age he worked hard."*
- *"I do not like his choice of peri-urban dwelling. For a country man who grew up on a white farm he knows more ways of farming. One would have thought he would go for commonage land."*
- *"It would have been better if he had gone to another chief and tried to get land. I am worried because there are many hawkers in town who will compete with him."*

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