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## **MIGRATION TRENDS IN THE LARGELY RURAL REGIONS IN POLAND (A CASE STUDY OF OPOLE SILESIA)**

**Abstract:** The article is devoted to the problem of the persistence of migration trends in the largely rural regions (the Intermediate Regions with 15% to 50% of the population of the region living in rural local units) where particularly favourable conditions for the negative economic and social transformation appear. The question in what circumstances intermediate rural regions become a migration region is the basis for discussion. The authors try to find factors strengthening the foreign migration outflow and indicate solutions to the regional policy.

**Key words:** Intermediate rural regions, foreign migrations, migration region, regional development, Opolskie province.

### **1. The regional nature of foreign migration in Poland**

While up until 2004 migration affected only a few provinces in terms of regional development, currently, more areas appear to be significantly affected by dynamic mass outflow. In this context Opole region<sup>1</sup> could be regarded as a migration region, one which may serve as a pattern for migration development dynamics, the effects on the regional and individual scale and the mechanisms that shape this process.

For several decades the Opolskie province has been an area of sustainable (definite and temporary) outflow, initially only to Germany, and now also to other European countries (mainly the Netherlands but also the United Kingdom, Ireland, Italy and Sweden). This process, largely reflecting historical and political factors, has led to

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<sup>1</sup> The term: *Opole Silesia*, *Opolskie Province* and *Opole region* are used interchangeably and mean in the article a regional administrative unit on level NUTS-2.

the formation of resilient networks of migration ties. These have been broadened by certain groups of the region's residents who, before Poland's accession to the European Union, participated in international migration to a small extent. The decrease in population caused by emigration from the region, both directly and indirectly affects the deterioration of its demographic structure, even resulting in severe disorder of the population's structure (such as declining birth rates, deformations of the age and gender structure, ageing, family breakdown and the weakening of social ties). Furthermore, the migration outflow has a clear impact on the opportunities and direction of socio-economic development of this area, in both positive and negative terms [Heffner, Rauziński 2012]. The foreign labour migration of the predominantly rural population is of particular importance, having a direct impact on regional development and the transformation of local structures [Dijkstra, Poelman 2008]. Such migration mainly increases the financial capacity of the region's population, which – in the case of the Opolskie province – translates primarily into an increase in investment in individual projects which improve the living standards and social prestige. To a lesser extent, migration is associated with the development of entrepreneurship where migration income is invested in small and medium enterprises. This means that migrants in the Opole region are less prone to the risks associated with entrepreneurial activities and easily accept the continuation of circulatory migration [Solga 2002, Żurawska 2007]

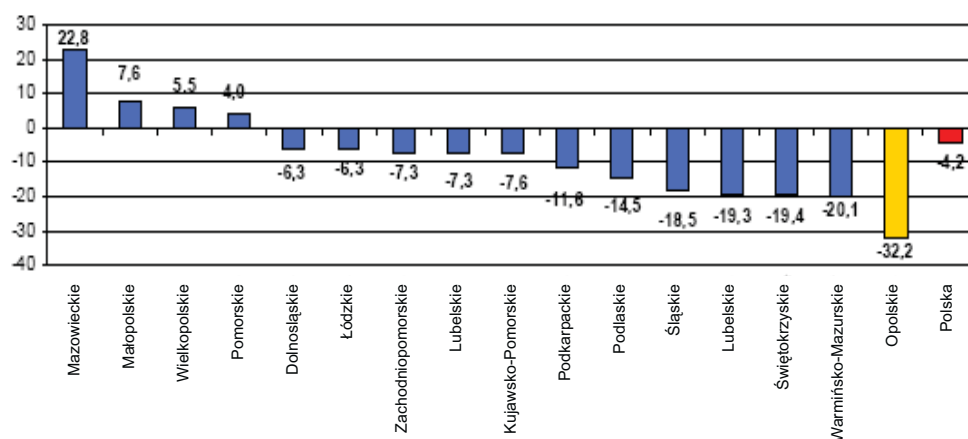


Figure 1. Total net migration by provinces in Poland for the period 1998-2007 (in thousand persons)

Source: The Opole Province Marshal Office Regional Development Department, Opole, 2008.

Furthermore, the scale of the international migration that exceeds the level of unemployment in the region may indeed reduce the stimulus to migrate, although the reduction of unemployment need not be accompanied by a simultaneous increase in employment and economic activity. People that depart do stimulate the economic pros-

perity, but mainly in the outlying areas from which goods and services are imported, and often work resources [Brücker, Defoort 2007; Heffner, Rauziński 2003].

As a result, from a regional and local policy perspective, the strategic balance of benefits and costs associated with the external migration can significantly weaken the economic and social position of the migration region, especially when the migration is of a permanent and mass character. Despite generally positive effects of the migration movements on individual income, consumption and the quality of related services, the general conditions of the socio-economic development in the migration region worsens, leading to the marginalisation and decline of the region as a whole. The negative impact of migration on local development, particularly in rural areas, reveals very low local governments incomes, and hence the weakness of the public sector and their low level of development.

## 2. Return migration and reintegration – the use of the effects of migration on accelerating the development of the region

At present in the context of mass departures, not only reversing the negative trends in the migration seems important, but also making use of the capital, not only the financial, accumulated by the emigrants. In a free market economy, the mass labour migration of Poles should be used for the development of the regions from which they originate by encouraging the return and emphasising the need to create a sector of small and medium enterprises [compare to Heilbrunn *et al.* 2010]. Migrants returning from countries with advanced economies could also play an important role in transmitting knowledge on market mechanisms and the functioning of modern economics. This task is certainly not easy.

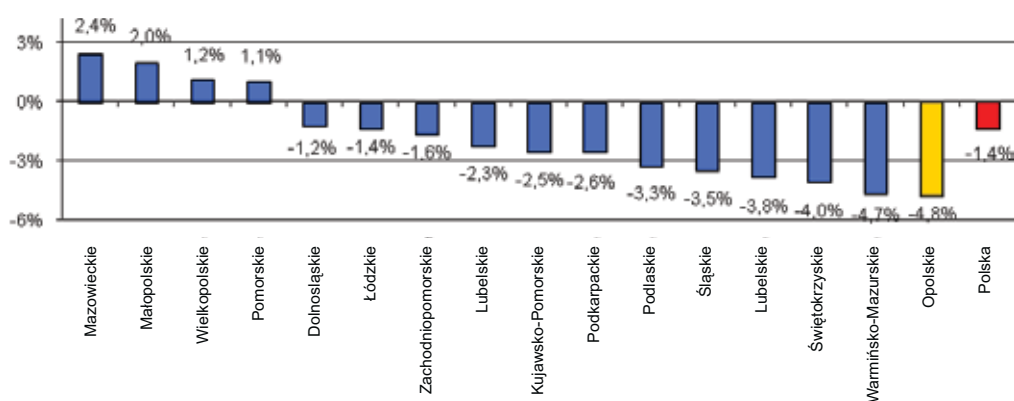


Figure 2. The quantitative change of population in 1998-2007 by province (as of 31.12 in %)

Source: [Report... 2008, p. 9].

The authors of *The Migration and Remittance Report*, issued by the World Bank, point to factors that may cause potential emigrants to remain in their home country, and cause those who have departed to return. In the analysis, the CPIA Index (Country Policy and Institutional Assessment) was employed, evaluating quality of life (the macroeconomic policy, the financial sector policy, environmental protection, the financial services policy, trade, the social policy or conditions for production investment). It turned out that the standard of living expected by a migrant in his/her homeland, assuming the permanent differences in income, plays an important, albeit minor, role in the decision to emigrate. For example, a CPIA index rise of 10% in Poland would effect a 0.4% decline in emigration. If the index reached the national average of the EU-15, then emigration would decrease by more than 1%, which is not a considerable quantity<sup>2</sup> (Fig. 2).

In this situation, the regional projects focused on creating favorable socio-economic conditions for emigrants to return may be important, but insufficient. It appears that a higher level of return migration could be brought about by strengthening the migrants' relations with their region of origin. This may involve encouraging them to directly participate in capital investments or to help promote enterprises formed on the basis of capital, knowledge and experience gained by the owners during their time abroad. This type of activity would give migration an economically rational importance for regional and local development [Zimmermann 2005].

### 3. Return migration and its impact on development of the region

The Experience with initiatives supporting the return from abroad, and the prevention of foreign migration in the migration region enabled the formulation of the following potential tools of the regional policy strengthening the trend of return migration:

- The establishment of institutions: *Regional Monitoring Centres for Migration*, whose aim should be to offer returnees jobs, training, retraining assistance and implementing acclimatization programs. This especially concerns the migrants with low-level education who may have problems with reintegration.
- The conducting of media campaigns showing changes in the migrants' area and country of origin; such action could be introduced not only across regions but also in those areas abroad where most Poles reside.
- The use of a series of reports in the regional (and local) media to promote successful people, *i.e.* those returnees who have started successful businesses.
- The development or creation of informative websites with information on current vacancies, training opportunities, formal and legal affairs – related to setting up

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<sup>2</sup> Quoted from: *Biuletyn Migracyjny* No. 11, Warsaw, February 2007, p. 4.

economic activity, tax matters, particularly relating to tax amnesty, *etc*; additionally there should be information on such websites in local newspapers, local council offices, selected shops.

- Help in enabling the current migrants to contact people from the business incubators and obtain information related to starting their own business; the mobilizing of the local governments and NGOs working in local communities to be more active in this regard.
- The organisation of meetings with local entrepreneurs, local authorities, experts in conducting economic activity, teams of psychologists to familiarize migrants with the local labour market opportunities, job offers, the local entrepreneurs needs for employment.
- The implementation of incentive programs for the migrants who graduated from foreign universities to continue their career in their country of origin and the migration region.

In 2000-2010, several initiatives to directly promote return migration were created. One of them is a tax amnesty initiative that has been in force since August 2008, aiming to reduce the tax burden for returnees. According to current regulations, Polish citizens working abroad are liable to be taxed in Poland, depending on the country where they work, using a proportional deduction method or exemption with progression- method<sup>3</sup>. Often, in spite of the same income, persons paying tax according to the proportional deduction method (*e.g.* agreement with the U.S., by 2007 with the UK) had to pay a higher tax than those who used the other, more beneficial method (*e.g.* the agreement with Ireland, Germany, and from 2006 with Sweden). Therefore, the Ministry of Finance prepared an Act aimed at levelling the tax burden on those working outside the Polish borders, resulting from the differences between the methods of avoiding double taxation [Heffner, Solga 2009]. The research has led to a number of projects, implemented by the local governments in some regions of the country. For example, in the Opolskie province, a programme has been developed and aimed at reducing mass labour migration by promoting employment opportunities and career development in the region. It also promotes further study and professional development and encourages people working abroad to return. The programme is aimed at pupils, students, job seekers or those wishing to change jobs, and in the next stage to the region's inhabitants who have been working abroad. The activities focus on the promotion of learning opportunities, employment in the region, professional career development, setting up a business and on education regarding the negative social effects of mass emigration. The regional authorities have run their initiatives in Opole companies, universities, labour offices and schools [Solga 2008].

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<sup>3</sup> It comes to the Act on special solutions for taxpayers receiving some revenues outside Polish territory dated July 25, 2008.

#### 4. The effects of departures – the socio-economic context

The Opole region has been associated with international migration for several decades and has been shown as a phenomenon in this regard. Today, it is not the only area in the country from which people leave *en masse* to the West. But still, given the scale of emigration and the sustained nature of this process, this is the area where the consequences of migration are mostly economic and social. Certainly, it is very difficult to make a clear assessment of those effects, since migration is associated not only with tangible benefits, but also with a number of risks and costs of an individual and social nature, both in economic as well as non-economic terms.

The benefits for an individual migrant and his family are associated with the chance of finding a job, a better job or any job, and obtaining a relatively higher income. The opportunity for earning affects the level of wealth of the migrant families, thus resources and assets of the region's inhabitants improves due to the individual income transfer. Unfortunately, only part of the money earned in exile is invested and consumed in the region, which means that they also interact in other places (mainly the immigrant regions), while an absence of migrants, limits the internal region's market and potential disposable labour resources [*i.e.* Rokita, Jończy 2008].

When there is high unemployment in some parts of the country, migration can mitigate the effects of the job shortages. Absorbing a partially mobile workforce to a large extent reduces the pressure on work and unemployment at the same time. The number of unemployed in the Opolskie province would be twice as high if all of its residents currently employed elsewhere in the EU returned and tried to find work.

The advantages of labour migration are also linked with the transfer of migrant incomes to Poland. According to estimates, the economic effect of migration is considerable. The assessments indicate that over the past five years, the value of the financial transfers to Poland has increased from around 2 to 7 billion dollars annually. It is estimated that migrants in the Opole region bring in more than 2.5 billion PLN annually, spending it in the region or outside it on a variety of goods and services, thereby also indirectly influencing the quality of life of the non-migrant people [Jończy 2010; Jończy, Rokita 2007]. Too high a level of labour migration, however, may become a significant threat to the demographic situation in the regions of emigration. Such areas may even come close to the limits of emigration from the demographic perspective. In the Opolskie province, the situation of the indigenous population in this respect is particularly disadvantageous. Since the year 2000, more people emigrated to the West than was compensated for by the natural increase. In addition to a decline in the birth-rate, the long-term absence of men (especially up to the age of 40) and an increasing number of migrating women in recent years have had successively negative effects. Particularly unfavorable are the negative effects of migration resulting from family separation and the disintegration of family ties, where the normal development of marriage and parenthood ties are disturbed. "Euro-

orphaning” became recently a notorious problem, which according to research may relate to more than 110 thousand families in Poland. Migration thus contributed to the emergence of a new type of broken family as a result of emigration. It seems that the incidence of this category of family and their problems will increase, partly because of a lack of social and cultural acceptance of a family model where spouses are permanently separated. Labour migration, especially long-term, not only weakens family ties, but also influences the relationship with the region of origin and local community. Although migrants accumulate economic capital, they certainly lose their often already limited social and cultural capital. The so-called double marginalization of migrants repeatedly occurs, *i.e.* at their work place abroad, due to problems with integration into a new, often culturally strange environment or often insufficient knowledge of a language, and in their place of origin, where a migrant is absent and thus gradually alienates himself from the local community and its undertakings [Stark 1984; Stark, Fan 2011].

For the economic development of migration regions, the adverse impact of migration outflow (definite and circulatory) is of crucial importance. In part, local labour market emigration includes the large groups of workers of defined specialties such as construction, food, agricultural and horticultural or medical, which significantly reduces the potential, and hence the investment attractiveness of districts and the whole region. This situation is also detrimental to the development of small and medium enterprises which, in the face of increasing migration abroad, lose their capacity for activities and development.

In migration the region’s capital investments involving investment of funds from the income earned abroad is of marginal importance. There is a small number of effectively functioning companies, which were founded through the use of capital, knowledge and experience gained by their owners due to work abroad. Although emigrants accumulate substantial capital, not only financial but also human (higher work culture, professional experience, knowledge of new technologies and civil society), it contributes only to a small degree to building a modern economy at the local and regional level. Although people working abroad often have better professional qualifications and entrepreneurial skills in the broad sense, it is not without significance that they often work permanently below their qualifications [Seibert, Wapler 2012]. This applies especially to a growing group of young migrants, with a university degree, who – given the nature of the labour market available to foreigners – have little chance of promotion. Relatively high wages keep them in the sphere of migration flows, which in turn leads to the depreciation of their qualifications on the local and regional markets. Persons returning from abroad are generally less educated and less able to compete on the labour market in relation to the people who do not migrate. Moreover, the migrants who return are more likely to be those who did not acquire new skills abroad [Heffner 1999] but the structure of the returnees, after Polish accession to the EU is gradually changing [Nowak 2011].

Certainly, an important factor of the migrants’ return and their investment activity is the economic and political situation in the country. While this situation is shaped



by entities at a central level, local initiatives can also yield results. The question arises as to whether and to what extent it is possible for local authorities to inspire the residents who currently earn abroad and re-direct them into entrepreneurship. There is no doubt that the need to build different kinds of incentives that encourage the groups of migrants into entrepreneurship may be particularly important because they may have a positive impact on local development.

### 5. Foreign migration as a determinant of the development processes in the migration region

International migration is the main factor disrupting the natural fluctuations of the population in the Opole Silesia region and a factor deepening the demographic crisis. International migration (permanent and seasonal) has specific regional aspects. It is rooted in historical traditions associated with seasonal work in Germany, postwar migration associated with the German population displacement and migration of a permanent and seasonal nature. The migration processes and strong family ties are conducive factors to seasonal work abroad and permanent emigration. The demographic crisis in the Opolskie province is rooted in long-lasting, permanent international migration.

Table 1

Opole Silesia. Permanent emigrants in the characteristic phases of migration in 1950-2010

| Years        | Permanent emigrants |              |
|--------------|---------------------|--------------|
|              | in persons          | in %         |
| 1951-1960    | 60 578              | 25.3         |
| 1961-1970    | 25 252              | 10.6         |
| 1971-1980    | 50 914              | 21.3         |
| 1981-1990    | 37 464              | 15.7         |
| 1991-2000    | 27 327              | 11.4         |
| 2001-2005    | 20 479              | 8.6          |
| 2006-2010    | 16 927              | 7.1          |
| <b>Total</b> | <b>238 941</b>      | <b>100.0</b> |

Source: Own calculation based on materials of the Central Statistical Office (GUS), the Statistical Office in Opole (WUS Opole) and statistical yearbooks (Rocznik Demograficzny).

During the researched period three characteristic phases of migration can be distinguished: nationality-related, family reunification and economic.



In the first decade of the 21st century, the factors leading migrants to leave the country and attracting them to Germany and the EU became so strong that Opole Silesia reached the limits of possible emigration from the perspective of the demographic situation. At present, wage relations between Poland and EU countries are beneficial for people working abroad, and seasonal migration assumes a mass character. Migration of the region's population to the EU (predominantly to Germany) throughout the whole period of transition (1989-2010) was also very high (Tab. 1). Although analysis of net international migration indicates that the current migration potential is gradually weakening, much more in rural areas, to a lesser extent in cities (see Figs. 3-4).

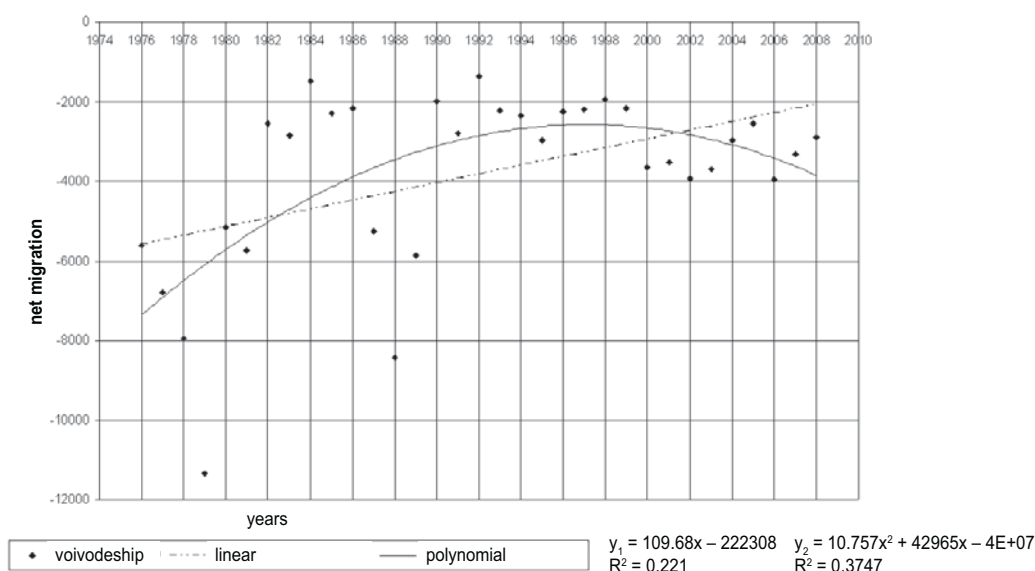


Figure 3. Net migration in the Opolskie province in 1976-2008

Source: Own elaboration [Heffner 2012]. (Figs 3,4).

It should be noted that during the economic transition (1989-2010), the level of permanent migration did not decrease, while there was a strong increase in circulatory and seasonal labour migration. There is a clear link between the unemployment on the local labour markets of the Silesian cities and districts and the labour migration to the EU. A brain-drain effect on the local labour markets, especially from the occupations in short supply, creates certain difficulties in the economy of the entire region [*i.e.* Rauziński 2010].

Analysis of the socio-occupational characteristics of the migrants, the extent and demographic structure of the emigration in spatial systems (cities-districts) indicates that emigration losses play an important role in the local labour markets, limiting the supply of qualified personnel. A number of cities and districts in the eastern and central parts of the Opolskie province are characterized by a very high level of international migration – more than 8% of the population.

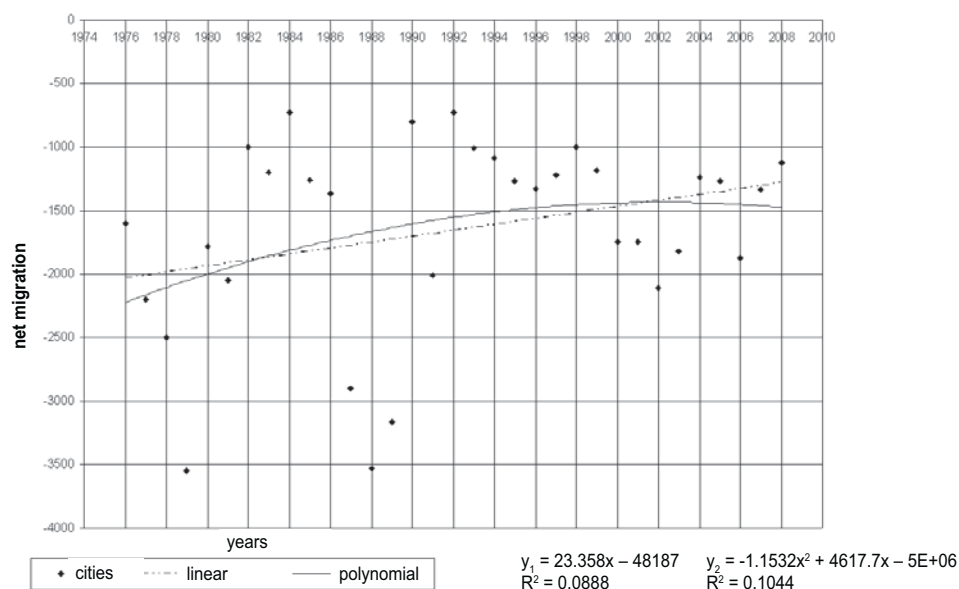


Figure 4. Net migration in rural districts of the Opolskie province in 1976-2008

Due to a lack of reliable population statistics, the volumes of permanent and seasonal emigration are not clearly defined. Research shows that between 1976 and 2008 the proportion of permanent emigrants to the birth rate averaged 67.4% in the cities and in the rural areas, even 90.9%. Thus migration almost equals the entire natural increase of the local Silesian population. In many cities and rural districts, migration far exceeds the natural increase [Rauziński, Szczygielski 2010].

In the light of demographic studies, it is clear that the role of the local and regional case studies on the issues of international migration has become more important, given the need to monitor the demographic, social and economic consequences. The excessive migration to EU countries, and thus a considerable loss of qualified personnel, should be considered as a major factor interfering with the development of the region, not only in terms of demography, but primarily the economy. The impact of the migration and circulatory movements abroad on Opole Silesia regional development can be analysed in the following six issues:

- the demographic loss and an outflow of qualified personnel, as well as the high-unrepayable costs of education,
- money transfer,
- the labour market development (an aspect of unemployment), the economic initiatives of the permanent and temporary migrants,
- the income of the permanent and temporary emigrants' families,
- the income of the emigrants' families, and the structure of their investments,

- the economic situation of the cities and districts with the highest rates of emigration to Germany.

The volume and structure of the permanent and temporary migrant groups on the local labour markets suggest a constant division of the region into two distinct areas: the area inhabited by the Silesian population – more urbanised and suburbanised in rural part, and the remainder, the more agricultural and only entered a phase of urbanization in some rural areas. Although this spatial structure has gradually become more complex.

The socio-economic effects of the migration are reflected in:

- the mass seasonal work in Germany and the EU clearly limiting the unemployment in the local labour markets;
- the transfer of capital from employment in Germany and the EU;
- the scope of family tourism and holiday visits;
- the scope of running own businesses, mostly in a place of residence, the development of small and medium sized businesses and investing in private property.

Further excessive permanent and seasonal migration negatively affects the demographic processes in the region. The drainage of highly educated personnel, the depopulation of numerous villages and districts are clearly felt. In total, in the areas inhabited by the Silesian population (including the German minority) the unemployment rate is low and the inflow of capital from labour considerable. Thus the emerging socio-economic situation, in spatial systems of the region exhibits a number of development disparities. Research indicates a constantly clear division of the province in the sphere of capital accumulation into areas A – inhabited by the Silesian population (the German minority) with a high socio-economic development, better living and working conditions, better housing and health provision, and areas B – characterized by socio-economic decline, inhabited by an immigrant population (agricultural). A completely new socio-professional population structure has been created. There is a high level of socio-economic development and economic infrastructure in the districts and cities in the eastern part of the Opolskie province. Taxonomic studies confirm this condition (22 variables). The same analyses show the progression of wide spatial disparities in living conditions, work, health, housing and income in the rural areas inhabited by an immigrant population, which could lead to an increased outflow to foreign countries after the full opening of the EU labour markets to Polish workers. In 2010 over 80% of ‘indigenous’ districts were in areas of higher economic activity and low unemployment, contrary to the ‘immigrant’ districts. The results of these differences are distinctive demographic processes, although it should be added that the central part of the region is influenced by the impact of the regional centre – Opole (urban – rural outflow, partially compensating for the negative impact of the external migration [see more Heffner 2010].

The demographic processes pose significant threats to further demographic and socio-economic development throughout the province. The depopulation of Opole Silesia should be considered as an important factor causing a crisis at least at a regional level. It shows an economic weakness and a low resistance to the negative phenomena

related to restructuring. Simultaneously, analysis of the population balance in a spatial system points to a significant demographic variation, depending on the regional origin of the population and the economic situation in the cities, districts and villages. The transition years spurred further outflow of the population from the province.

### Summary

In Poland, a typical emigration country, international migration has permanently entered into society's awareness. Its scale has increased substantially, especially during the transition, but mainly after Poland's accession to the European Union in 2004. The latter event, especially, created an entirely new situation in the migration processes, both quantitatively and qualitatively, affecting both the economy and the functioning of the entire society.

From a Polish, and to some extent also from a European perspective, the Opole region is a specific area in regard to external migration processes, which here relate primarily to rural areas. The fact that it is termed *the migration region*, means that departures abroad are common and substantially affect economic, social and cultural, and thus also political processes. At a national level, the population outflow abroad did not seriously affect other regions until 2004, while in the Opolskie province, the phenomena associated with migration have been developing continuously for many years, often reaching the level of an *exodus*. A constant net population loss due to international migration, as well as a high level of circulatory migration, shows a set pattern of high spatial mobility of the Opole Silesia inhabitants.

As far as regional policy and development are concerned, assessments of the effects of the economic and social movements are ambiguous, but experience of the Opole region in this field indicates that the overall balance of the impact of international migration on regional development is negative, both in the individual dimension of migration as well as in terms of the socio-demographic and economic consequences. On the one hand, we have a community willing to look for work even at considerable distances from home, and thus well prepared to compete for a job in the European market. This situation may, for example, prevent a significant increase in unemployment and many associated negative social and economic consequences. On the other hand, this process deprives the region of a substantial part of the most valuable – in terms of economic development – population, undermining its development potential, which may lead to its marginalization. In this situation, the return of emigrants who possess economic, social and cultural capital can have a significant effect on strengthening the development potential of the region of origin. However, there are more central than regional entities that demonstrate activities in this regard (entities at a central level shape the economic and political situation in the country, build a climate of entrepreneurship, investment and development). However, initiatives at a regional

and local level, run by local authorities and NGOs may also yield results (such as creating a business climate, counteracting the social and occupational deactivation of the returning migrants [*i.e.* Dustmann, Weiss 2007; Stockdale 2006]).

In the case of a limited regional labour market, the return migration is small-scale, but encouragement and preparing the ground for the effective return and successful reintegration of the migrants can be an effective tool for the gradual reversal of the negative impacts of the migration processes on the region's development [compare to Ní Laoire 2007; or Farrell *et al.* 2012].

Permanent outflow results in the progressive depopulation of the migration region, which weakens human resources and limits regional demand – significantly affecting its development prospects and competitive position.

The deepening demographic crisis and, in particular the processes of emigration from the Opolskie province call for concerted efforts at halting and reversing the negative trends in this regard. This applies in particular to facilitating the return migration (labour and permanent), stabilising the demographic situation and immigration opening. The support of rural residents, especially those located peripherally (young people, particularly graduates, professionally inactive persons), with a significant potential for migration, may prevent the deepening negative effects. This is even more important that in the traditional migration outflow area (the eastern and central part of the Opole region) where migration patterns have a stabilized level and type of emigration, while so far passive areas in this respect (the western part of the region), could easily start to activate their migration potential.

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