

SOCIAL INEQUALITIES AND MIGRATION. THE CASE OF BULGARIA

*There are various causes for, and consequences of, international migration and some of the most significant are the availability of economic and social differentials, and the possibilities for their reduction. The relationship between social inequalities and migration is examined in the paper from three different aspects: 1) social inequalities between countries and within sending countries as an important determinant of migration processes; 2) social (in) equality as a result of migration – immigrants' integration and position in the society of the destination countries; 3) migrants' transfers as a premise for reduction of social inequalities in sending countries. Analysis and assessment of the quality of life disparities between Bulgaria, the EU average level, and some of the desired by Bulgarian migrants EU countries of destination, and of inequalities in Bulgaria are made. They are based on official statistical data and on the results of an empirical study of Bulgarian migrants.²
JEL: I31; O15; F22*

There are many economic, social, political, cultural, psychological, etc. causes to migrate. Some of the most important motives for migration are the economic and social ones. Among the significant factors of migration must be mentioned: access to markets, job opportunities and prospects, welfare and incomes, quality of life, social security and ex/inclusion, social (in) equality, and so on. Other powerful determinants are the existence of ethnic networks, marriages and family reunion, access to education, etc., as well as migration policies which affects migrants in different ways by setting legal and political framework.

The determinants and consequences of migration are subjects of different theories trying to explain the causes and effects of migration. Determinants of migration have been researched in many cases on the ground of the “push-pull” models. The roots of the models could be found into the Functionalist Social Theory. According to this theory migration is a function of disequilibria and people move from low-income to high-income places.

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² The survey was done in 2013 under the project “Migration and Transnationalism between Switzerland and Bulgaria: Assessing social inequalities and regional disparities in the context of changing policies”, financed by the Bulgarian-Swiss research programme (IZEBZO_142979). The author of this paper was part of the team which carried out the empirical study.

Generally, “push-pull” models identify different factors – economic, demographic, etc. – which push and pull people out of their origin places into destination places. In this context, the Neo-Classical Economic Theory claims that at the macro level international migration is driven by geographical differences in labour supply and demand, in incomes and wages (Lewis, 1954; Harris and Todaro, 1970; Massey, Arango, Hugo, Kouaouci, Pellegrino and Taylor, 1993; and others).

The New Economics of Labour Migration explains migration as a collective (family and household) strategy/decision to overcome market failures (not only labour market), to diversify incomes and to spread income risks. As stated by the theory, main drivers of migration are relative deprivation, income inequality, social security, and access to markets in sending societies (Stark, 1991; Taylor, 1999; and others). According to the Dual Labour Market Theory pull factors (the demand for immigrant labour) are the driver of international migration. The theory ignores the push factors in the origin countries (such as low wages and high unemployment) (Piore, 1979; Straubhaar, 1998; and others). The Relative Deprivation Theory underlines income differences in sending societies as an important factor for migration, i.e. incentives to emigrate are higher in societies which experience much economic inequality (Stark and Taylor, 1989).

These and other theories put the accent on income and wage levels and inequalities, and their effects on migration processes. There are other theories trying to explain the initiation and also the continuation of migration, such as the Network and the Institutional theories. Some researchers underline also the relation between migration and people’s capabilities and aspirations (De Haas, 2010, 2011). Migration policies affect migrants’ flows and integration in a specific manner and set the legal and political framework within which other aspects of integration occur.

Different explanations of the nature and causes of migration exist, various theories have emerged under the influence of the worldwide global changes and the complexity of the nature, causes and effects of migration, but still it is hard to repudiate the leading role of economic and social differentials in driving migration processes.

Social differentiation reveals the differences between people as a consequence of the existing inequalities between them. Social inequality has various dimensions, the most important of which are related to: income and welfare, quality of life, access and participation in the labour market (employment opportunities and status), social ex/inclusion and discrimination, privileges and prestige, education and health status, housing, and also gender, ancestry, race, ethnicity, etc.

Social inequality is characterized by the existence of unequal distribution of goods and wealth, of opportunities and benefits. There are two main ways to measure social inequality: inequality of conditions (distribution of income and wealth), and inequality of opportunities (health status, level of education, employment opportunities/prospects, etc.).

The inequalities, as well as the opportunities, are substantial drivers of migration. Inequalities between the countries and also within countries of origin generate migration. Emigration is promoted not only by wage and lifestyle differences between the countries,

but also by deprivation, social exclusion, quality of society, future perspectives within the origin areas.

However, migration does not necessarily reduce inequality. In many cases migrants are a deprived group of the population in the destination countries. They may have unequal access to rights (including access to employment, to jobs for which they are qualified, some other social and political rights, etc.) notwithstanding the fact that they could at the same time benefit from migration by way of better economic and social conditions in host countries compared to origin ones. In this respect, migration management policies of the destination countries may have important effect on migration flows and impacts in terms of access and opportunities.

There are different opinions and study results also about the question whether and how remittances affect inequality in sending countries – by decreasing (or not) income inequality, by improving living conditions of migrants' families in origin countries.

Further in the paper are examined economic and social disparities between Bulgaria and the EU average level (and some of the desired by the Bulgarian migrants EU destination countries), as well as some aspects of social inequality in Bulgaria. Empirical evidences about the influence of social inequalities on migration flows and migration intents in Bulgaria, the integration of Bulgarian migrants abroad and their money transfers back to the country are presented.

Social Inequalities as a Determinant of Migration

Bulgaria within the EU – socio-economic disparities

Bulgaria is the member-state with some of the worst indicators about socio-economic status/quality of life and perspectives for its population in the European Union. The existing social and economic conditions and prospects for their improvement promote migration intents in the country.

Bulgaria is a relatively poor country. Its GDP per capita is lower than 50% of the average EU-28 level (lowest among the EU member-states). The earnings of the population are several times lower than the average EU indicator (lowest in the EU). The share of the population at risk of poverty or social exclusion is the highest in the EU (48% of the total population). The material conditions are worse and material deprivation is very high (the percentage of severely materially deprived people, of the total population, is the highest in the EU) (Table 1).

The economic activity of the Bulgarian population, which determines to a sizable extent the incomes and wealth, is lower than the EU average indicator. The rate of unemployment is comparatively high, as well as the percentage of the discouraged persons not seeking employment because they do not believe that they can find a job (only Italy has a higher percentage among the EU countries) (Table 1). Worse is the status of younger generations. The share of young people neither in employment nor in education is almost two times higher than the average EU level: for the age group 15-24 years the percentages are 12.4% for the EU-28 and 20.2% for Bulgaria (only Italy has a higher percentage than Bulgaria

among the EU counties), and for the age group 25-29 years are 20.3 and 29.6% respectively (only Italy and Greece have higher percentages).³

Table 1

Main quality of life indicators (2014)

Indicators	Bulgaria	EU28	Germany	UK	Spain
GDP per capita in PPS (Index EU-28=100)	45	100	124	108	93
Annual net earnings (single person, EUR)*	1949	12796	15473	17550	11478
Inability to face unexpected financial expenses (% of total population)*	64.1	39.8	32.9	41.1	42.1
People at risk of poverty or social exclusion (% of total population)*	48.0	24.5	20.3	24.8	27.3
People at risk of poverty after social transfers (% of total population)*	21.0	16.6	16.1	15.9	20.4
Percentage of total population less than 60 years living in households with very low work intensity*	13.0	10.8	9.9	13.2	15.7
Severely materially deprived people (% of total population)*	43.0	9.6	5.4	8.3	6.2
Share of total population having neither a bath, nor a shower in their dwelling (% of total population)*	13.8	2.5	0.0	0.4	0.1
Employment rate – persons aged 20 to 64 (%)	65.1	69.2	77.7	76.2	59.9
Unemployment rate – persons aged 15 to 74 (%)	11.4	10.2	5.0	6.1	24.5
Inactive population (15 to 64 years) – main reason for not seeking employment “Think no work is available” (%)	13.5	5.7	1.6	0.5	7.1
Self-reported unmet needs for medical examination (reason – too expensive or too far to travel or waiting list, % of the population)*	8.9	3.6	1.6	1.6	0.8
Life expectancy at birth (years)*: – males	71.3	77.8	78.6	79.2	80.2
– females	78.6	83.3	83.2	82.9	86.1
Infant mortality (per 1 000 live births)*	7.3	3.7	3.3	3.8	2.7
Early leavers from education and training (% of the population aged 18-24)	12.9	11.1	9.5	11.8	21.9
Population with tertiary education attainment (25 years or over, %)	24.1	25.6	24.9	39.1	29.0
Tertiary educational attainment – age group 30-34 (%)	30.9	37.9	31.4	47.7	42.3
Lifelong learning (persons aged 25 to 64, %)	1.8	10.7	7.9	15.8	9.8

* Indicators for 2013.

Source: Eurostat, SILC (accessed 17.09.2015).

The opportunities and future prospects for the population in Bulgaria, related to health status (only Romania has higher infant mortality among the EU countries and the indicator about life expectancy at birth is among the worst in the EU), participation in education and

³ Eurostat data (<http://ec.europa.eu/eurostat>), accessed 17.09.2015.

training (only Romania has a lower percentage of population participating in lifelong learning process), employment prospects (perceptions of the population), etc., are worse than the average in the EU (Table 1). Most of the Bulgarian quality of life indicators are worse also than those in the preferred by the Bulgarian migrants EU countries of destination (the results from some surveys show that Germany, UK and Spain are the first three preferred destination countries by Bulgarian migrants⁴).

Bulgaria not only lags behind the current EU average level (and most of the other EU member-states), but also the EU strategic goals 2020, as well as the Bulgaria's own goals 2020 (Table 2), which suggests unfavourable future prospects and opportunities for faster improvement of the quality of life in the country.

Table 2
Current and target indicators – Europe 2020 and Education and training 2020 (%)

	EU		Bulgaria	
	2014	2020	2014	2020
Employment rate – persons aged 20 to 64	69.2	75	65.1	76
Early leavers from education and training (% of the population aged 18-24)	11.1	10.0	12.9	11
Tertiary educational attainment – age group 30-34	37.9	40	30.9	36
Lifelong learning (persons aged 25 to 64)	10.7	15	1.8	15
Share of employed graduates (aged 20-34 with at least upper secondary education attainment and having left education 1-3 years ago)	76.1	82	65.4	82
Low achievers (15 years-old, PISA study) in*:				
• reading	17.8	15	39.4	15
• mathematics	22.1	15	43.8	15
• science	16.6	15	36.9	15

* Data for 2012 – the last PISA survey.

Source: Eurostat (<http://ec.europa.eu/eurostat/web/europe-2020-indicators/europe-2020-strategy>), Education and training monitor 2014 (http://ec.europa.eu/education/tools/et-monitor_en.htm#country-reports), accessed 18.09.2015.

After the beginning of the economic crisis in the country the total employment rate has decreased. Although in 2012 the trend upturned, the rate is still lower than the one in 2008 and than the EU average level. Similar is the situation with the employment rate of the recent graduates, which decreases even now (in 2014) and is far below the EU average indicator and the strategic goal for 2020. There is a certain improvement regarding the participation in education (the share of early school leavers decreases and that of the highly educated persons increases), but some national and international studies indicate serious problems with the quality of education (for example, the PISA study results show that notwithstanding the decrease in the share of low achievers in reading, mathematics and

⁴ For example, a representative survey carried out in 2013 under the project “Migration and Transnationalism between Switzerland and Bulgaria: Assessing social inequalities and regional disparities in the context of changing policies”, financed by the Bulgarian-Swiss research programme.

science in Bulgaria, the country demonstrates the worst results in the EU and is still too far from the strategic goal for 2020).

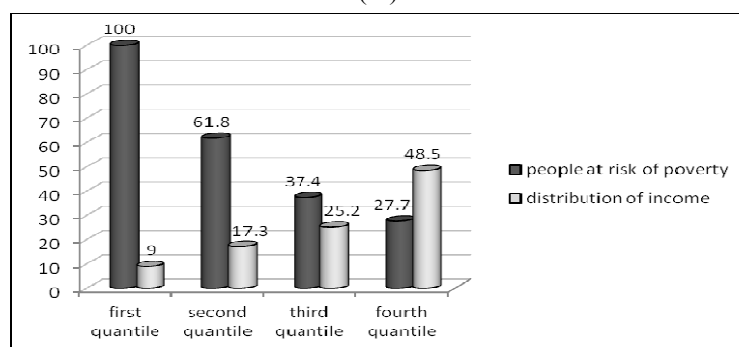
The comparatively lower living standard and incomes and higher poverty, lower quality of, and participation in, education and training, lower employment, including of young and well-educated persons, etc., the existing significant socio-economic disparities, i.e. inequality of conditions and of opportunities between Bulgaria, most of the EU member-states and the EU average level, are strong promoter of migration and of the intentions of many Bulgarians to go abroad, and are one of the most important determinants of the country as a sending (emigration) one.

Inequalities in Bulgaria – causes for migration

As mentioned before, inequalities between the countries, but also within the origin countries and the perceptions for unsatisfactory future perspectives are significant causes which generate migration.

The existing income inequality in Bulgaria (figure 1), which is higher than the EU average level, leads consequently to consumption inequality, and not only. It is a prerequisite for inequalities in, for example, the access to education and healthcare services. In its turn, it is partly a result from labour market inequality. Such a socio-economic environment determines the unfavourable subjective perceptions and dissatisfaction with the quality of life of a not small part of the Bulgarian population.

Figure 1
People at risk of poverty or social exclusion and distribution of income by quantiles, 2013 (%)



Source: Eurostat, SILC.

According to Eurostat data, the GINI coefficient of equivalised disposable income for Bulgaria is 35.4 while the average EU figure is 31 (it is the highest value in the EU for 2014). There are many studies on poverty and inequality in Bulgaria. The conclusions from the GINI country report Bulgaria “Growing inequality and its impacts in Bulgaria” (Tsanov, Ivanova, Panteleeva, Bogdanov, 2012) are that income inequality is a consequence of the economic development and the income policy, and the differentiation in

wages had increased (between 2002 and 2006 when two wage surveys were carried out by the National Statistical Institute⁵). These lead to inequality among households in terms of consumption. The social impacts of inequality on family formation and fertility rate, health inequality, life satisfaction, trust in public institutions, etc. are underlined also in the report “Growing inequality and its impacts: Bulgaria and Romania” (Tsanov, 2013).

The official statistical data⁶ show the existence of significant inequalities in the country, concerning income, risk of poverty, material deprivation, consumption, etc. The distribution of income by quintiles (share of national equivalised income, EUR) is 6.4% for the first and 42.1% for the fifth quintile in 2013. The percentage of population (aged less than 60 years) living in household with very low work intensity is respectively 50 and 1.3%. The share of people at risk of poverty or social exclusion by income quantile is 100% for the first and 27.7% for the fourth quantile and the severe material deprivation rate is respectively 81.2 and 26.7%. The self-perceived health as “bad” by income quintile is 15.9% for the first and 3.3% for the fifth quintile.

There are also significant disparities between the total household expenditure and consumption by decile groups (Table 3).

Table 3

Total household expenditure and consumption by decile groups, 2014

	Total	I group	X group
Structure of total expenditure (%)			
foods and non-alcoholic beverages	32.3	44.6	25.3
housing, water, electricity, gas and other fuels	13.4	16.1	9.9
clothing and footwear	3.8	3.6	4.8
furnishing and maintenance of the house	3.7	3.2	4.1
health	5.2	4.5	4.4
transport	7.3	3.7	10.3
communication	4.4	3.6	4.1
recreation, culture and education	4.7	2.4	6.8
Consumption – average per capita (kg)			
bread and paste products	93.2	101.2	79.8
meat	32.5	22.1	39.8
fish and fish products	5.7	3.7	7.2
milk	18.8	10.1	24.7
fresh and frozen fruit	50.5	21.5	78.1
fresh and frozen vegetables	70.9	45.1	90.8

Source: NSI, Household budgets in the Republic of Bulgaria 2014.

According to the data from 2013 EU-SILC module on subjective well-being⁷, which show the average satisfaction level of all persons in a country (ranged from 0 to 10 points), Bulgarians are less satisfied than the average for the EU-28 with: overall life (4.8 and 7.1

⁵ The situation is not different compared to 2010, the last available official statistical data (the surveys are carried out every four years).

⁶ Eurostat data, accessed 23.09.2015.

⁷ http://ec.europa.eu/eurostat/cache/infographs/qol/index_en.html, accessed 18.09.2015.

points respectively for Bulgaria and the EU-28), material living conditions (satisfaction with finances 3.7 and 6 points, annual median equivalised net income EUR 2066 and EUR 15416), job (6 and 7.1 points), housing (6 and 7.5 point), social relations (satisfaction with personal relationships 5.7 and 7.8 points), safety (share of population reporting crime, violence or vandalism in the area 25.8 and 14.5%), environment (satisfaction with living environment 5.2 and 7.3 points, urban population exposure to air pollution by particulate matter 45.9 and 24.9 $\mu\text{g}/\text{m}^3$). All the above-mentioned indicators for Bulgaria are the worst in the EU.

Under such overall perceptions of (un)satisfaction in the country, the disparities in the ratings of satisfaction by income quintile are not small. The overall life satisfaction for the first quintile is 3.3 and for the fifth quintile is 5.9. The respective ratings for job satisfaction are 4.6 and 6.5, for satisfaction with financial situation – 2.2 and 5, with accommodation – 4.7 and 6.7, with living environment – 4.4 and 5.8, with recreation and green areas – 4.4 and 5.7.

The results of the third European Quality of Life Survey 2012⁸ also show that Bulgarians are less satisfied with the quality of life in the country than the average EU level. They are dissatisfied with the financial and material status of the households, as well as with the participation in public life and relations (Table 4).

Table 4
Results from the third European Quality of Life Survey 2012

	EU	Bulgaria
Satisfaction with present standard of living*	6.9	4.7
Deprivation index (number of items household cannot afford)**	1.2	2.9
• keeping home adequately warm	12	23
• paying for a week's annual holiday away from home	37	65
• replacing worn-out furniture	35	76
• meal with meat, chicken, or fish every second day	10	36
• buying new rather than second-hand clothes	17	51
• inviting friends or family for a drink/meal once a month	15	34
Social exclusion index***	2.2	2.7
'I feel left out of society' (strongly agree and agree, %)	10.5	17.9
Financial situation of the household compared with 12 months ago – worse (%)	34.8	51.7

* Mean value on a scale of 1 “very dissatisfied” to 10 “very satisfied”.

** Mean deprivation score measured as deprivation to different items are summed and weighted by the proportion in the country in question not deprived of the item. The higher the figure, the higher the deprivation.

*** Refers to the overall average score from responses to four statements: “I feel left out of society”, “Life has become so complicated today that I almost can't find my way”, “I don't feel that the value of what I do is recognised by others”, “Some people look down on me because of my job situation or income” (“strongly disagree”=1 and “strongly agree”=5).

⁸ Third European Quality of Life Survey (EQLS) 2012.

<http://www.eurofound.europa.eu/surveys/european-quality-of-life-surveys-eqls/european-quality-of-life-survey-2012>. EQLS are carried out every four years.

The unfavourable socio-economic conditions, the existing income inequality and the resulting inequalities in consumption, access to education and healthcare services, etc., and the low level of satisfaction with the standard of living (compared to the EU average) in the country are another promoter of Bulgarian migration.

Bulgaria as a net emigration (sending) country

The relatively unfavourable socio-economic conditions in the country, the lower satisfaction of the population with the quality of life and the existing perceptions of uncertainty for future perspectives are important drivers of the Bulgaria external migration. The extension of the EU Agreement on the Free Movement of Persons and the opening of the European labour markets give new possibilities for the migration processes.

The data about the Bulgarian actual and potential external migration is comparatively limited and unsystematic. According to the *National Strategy for Bulgarian Citizens and Bulgarian Communities Worldwide*⁹, the number of Bulgarians living outside the country is about three – 3.5 million persons and around 2 million are those who possess Bulgarian citizenship. As stated in the Draft Framework of a National Strategy towards Bulgarians Worldwide¹⁰ about 600 000 Bulgarian citizens had emigrated from the country from 1990 to the first decade of 21st century, of which nearly 20% were with higher education and the predominant part of the others – with secondary education. The census data of the National Statistical Institute¹¹ show that between the last two censuses in 2001 and 2011 the population of the country diminished by 564 331 persons and almost 1/3 (31.1%) of this decrease was due to external migration, which is estimated to 175 244 persons. In 2014, 28 727 persons declared to the administrative authorities a change of their address in Bulgaria with a new one abroad (settled abroad).

Bulgaria could be classified as a “net emigration” country, characterised by continuous negative migration increase for the last years. In this respect, the most unfavourable period after the accession of Bulgaria to the EU (and after the beginning of the economic crisis in the country) was 2009-2010, but also more recently in 2014, the year with the highest number of emigrants for the examined period. The “refugee wave” to the country¹² and the again growing emigration from Bulgaria have led to a small negative migration increase since 2012 (Table 5).

⁹ The Strategy is adopted in July 2014

(<http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=938>).

¹⁰ The draft is not adopted. It could be accessed at: <https://www.president.bg/docs/1352300432.pdf> (accessed 01.09.2015).

¹¹ <http://www.nsi.bg>.

¹² The data of the State Agency for Refugees show that since 2012 the number of asylum seekers sharply increased: from 890 persons in 2011 to 1387 in 2012 and 11081 in 2014. (<http://www.aref.government.bg/?cat=8>, accessed 01.06.2015).

Table 5

External migration – number of persons who have declared to the administrative authorities a change of their present address in the country with a new one outside and of an address outside the country with a new one in the country

	2007	2008	2009	2010	2011	2012	2013	2014
Immigrants	1561	1236	3310	3518	4722	14103	18570	26615
Emigrants	2958	2112	19039	27708	9517	16615	19678	28727
Migration increase	-1397	-876	-15729	-24190	-4795	-2512	-1108	-2112

Source: National Statistical Institute.

The potential Bulgarian migration is a subject of different studies. According to the results of a survey, carried out by the National Statistical Institute in 2011, the percentage of the Bulgarian population of the age group 15-60 years which intended to go abroad (potential long and short-term migrants, including labour and education migrants) was about 20%.¹³ For the predominant part of these persons the intention to go abroad was determined as: “to solve material problems, to live and work in conditions of a higher living standard”. Lower was the percentage of those who desired better professional realisation or education.

Similar are the results from consecutive empirical studies (representative surveys) from 2011 and 2013.¹⁴ They also show that around 20% of the population of the same age group demonstrate emigration intents. Some of the results from the last mentioned survey (2013) are presented below.

Empirical Evidences – Inequality and Migration

Perceptions of inequality in Bulgaria and intentions for migration

The results from the above-mentioned national representative survey in Bulgaria, carried out in 2013, confirm the conclusions, made before, and demonstrate the existing perceptions of inequality areas in the country and the intentions of a not small part of the Bulgarian population to migrate.

Answering a question about the main causes to leave Bulgaria, the predominant part of all respondents (**mobile and potential migrants**) state that these are the higher living standard and payment abroad. For most of them migration is a way to support their families and to a lesser extent better professional realisation. It has to be marked that a sizable percentage

¹³ The representative survey “Migration and migration behaviour of the population” was carried out together with the census in 2011 (<http://www.nsi.bg/Census/Vivmigr.htm>).

¹⁴ Some of the results from the first study (2011) are published in: Mintchev, Markova, Misheva, Zareva, Balkanska, Boshnakov, Kalchev, 2012. The second survey (2013) was done under the project “Migration and Transnationalism between Switzerland and Bulgaria: Assessing social inequalities and regional disparities in the context of changing policies”, financed by the Bulgarian-Swiss research programme.

just does not want to live in Bulgaria any more (because of the lack of perspectives, unfavourable public environment, etc.) (Table 6).

Table 6

How important for you is each of the following reasons to go abroad? (%)

	Not important at all	Not very important	Neither important, nor unimportant	Important	Very important
Higher living standard	1.5	1.2	6.9	29.6	60.8
Higher payment	1.2	1.4	3.9	17.3	76.1
Better professional realisation	7.5	8.7	17.3	23.7	42.8
To support my family or friends in Bulgaria	6.7	6.6	12.3	25.9	48.5
To ensure the desired education for me and/or my children	20.8	8.9	12.7	19.7	37.9
Marriage/partnership	64.7	12.9	10.6	6.1	5.7
To visit parents and/or friends	50.1	14.1	10.4	13.0	12.5
To accompany spouse, partner, parents, children	55.4	10.1	9.8	12.9	11.9
Foreign citizenship for me and my family	45.7	13.4	18.5	12.3	10.0
I just do not want to live in Bulgaria anymore (lack of perspectives, unclear regulations, bad public environment, crime, corruption practices, etc.)	19.6	10.2	31.6	19.8	18.8

In trying to find possibilities to increase their income and to support their families, the probability of going abroad to work, according to the respondents, is high. On the second place is the intention to emigrate (to live in another country) of those who want to live in a country with a higher living standard. The purpose to go abroad to study is on the third place, but still, the chance to stay abroad to work after the completion of the study is real (Table 7).

Table 7

How possible is it in the near future to: (%)

	Not possible	Fairly possible	Somewhat possible	Highly possible
Go abroad to work for a few months	72.4	8.5	9.9	9.2
Go abroad to study/specialise for a few months	92.2	3.8	2.2	1.7
Go abroad to work for more than a year	76.9	7.4	8.0	7.6
Go abroad to study for more than a year	92.1	3.7	2.3	1.9
Emigrate to another country to live there	83.5	7.3	5.1	4.1

The intentions to go to work or live in another country could be explained by the living standard and the existing inequalities between Bulgaria and other countries (mainly EU member-states) and in Bulgaria, according to the respondents.

Sizable inequalities are observed from the study results in the area of *labour market participation and working conditions in Bulgaria*. One third of the respondents who work or have worked (33.5%) declare that they have worked without a contract. These are mainly men, less than 45 years of age, with lower education level and incomes, but not only, predominantly form the Roma ethnic group (Table 8).

Table 8
Have you had any of the following cases during your work in Bulgaria?
(Answer “Yes”) (%)

Groups		Work without a contract	Partly or fully unpaid social insurance by employer	Overtime work without compensations	Insults and psychological abuse
Total		33.5	32.2	32.9	16.4
NUTS II	North-West Region	33.9	34.5	32.7	10.0
	North-Central Region	29.7	26.2	30.4	16.9
	North-East Region	34.3	33.8	29.9	17.4
	South-West Region	34.1	30.3	30.8	19.0
	South-Central Region	34.5	32.8	35.2	11.5
	South-East Region	32.7	37.2	38.6	22.0
Towns-villages	Capital Sofia	31.7	28.5	30.2	13.1
	Big towns	31.9	32.0	33.1	18.7
	Small towns	33.8	32.7	36.0	17.0
	Villages	36.5	34.7	31.2	15.3
Gender	Male	40.4	37.6	37.5	16.7
	Female	26.6	26.7	28.2	16.1
Age groups	15-29	35.3	32.3	32.7	16.4
	30-44	38.9	37.6	37.1	17.7
	45-59	31.1	30.6	32.0	16.2
	60-65	19.7	20.1	22.9	12.9
Ethnic groups	Bulgarian	32.6	31.4	32.2	16.2
	Turkish	30.7	30.5	28.6	10.0
	Roma	63.3	57.8	53.0	38.2
	Other	37.8	32.7	51.1	17.2
Level of education	Primary and lower	39.9	36.8	32.9	20.1
	Secondary	37.5	36.7	36.6	16.7
	Tertiary	20.4	19.0	23.8	13.8
Income groups (income per person in the household, BGN)	Up to 200	45.4	42.1	39.4	21.8
	201-300	35.8	33.5	35.2	11.6
	300 and above	31.1	33.1	32.2	15.5

Similar are the percentages and the profiles of the respondents who state that they have had problems with the insurance payments by the employers (32.2%) and with overtime work without compensations (32.9%).

About insults and psychological abuse at the workplace report 16.4% of the respondents. Those are mainly from the lower educated and lower-income groups, as well as from the Roma ethnic group, but not only (Table 8).

It has to be mentioned, in this context, that there are perceivable regional disparities – less favourable is the position of those persons who live in small towns and villages. There are disparities also at NUTS II level (Table 8).

Problems with *participation in education* declared 8.3% of the respondents, who have left school before completion of secondary education. These are persons mainly from villages and small towns (from North-Central, North-East and South-East regions), from the age group 60-65 but also 15-29 years old, with low income at present, mainly from the Roma but also from the Turkish ethnic groups (Table 9).

Table 9
Have you left school before completing secondary education? (Answer “Yes”)

Groups		%
Total		8.3
NUTS II	North-West Region	8.8
	North-Central Region	15.4
	North-East Region	10.3
	South-West Region	4.7
	South-Central Region	7.3
	South-East Region	9.0
Towns-villages	Capital Sofia	4.4
	Big towns	4.6
	Small towns	7.2
	Villages	17.1
Gender	Male	8.1
	Female	8.5
Age groups	15-29	8.6
	30-44	7.3
	45-59	7.1
	60-65	14.5
Ethnic groups	Bulgarian	4.5
	Turkish	23.2
	Roma	67.4
	Other	10.9
Level of education	Primary and lower	46.1
	Secondary	2.1
	Tertiary	0.6
Income groups (income per person in the household, BGN)	Up to 200	24.0
	201-300	2.6
	300 and above	3.0

Almost the same is the share of those who declare that they have *unmet needs for medical services* (8.5%). These are persons from the younger generations (less than 45 years of age), with lower education level and incomes, mainly from the Roma ethnic group. Smaller are the differences in this respect between towns and villages, but disparities are observed at NUTS II level (Table 10).

Responses to some other questions also demonstrate the existing quality of life problems in the country – *access to leisure, to healthcare, consumption, etc.*

Table 10

Do have unmet needs for medical services in Bulgaria (refused demanded health services)?
(Answer "Yes")

Groups		%
Total		8.5
NUTS II	North-West Region	6.6
	North-Central Region	9.0
	North-East Region	7.2
	South-West Region	7.7
	South-Central Region	10.1
	South-East Region	9.8
Townsvillages	Capital Sofia	8.3
	Big towns	8.7
	Small towns	8.8
	Villages	8.0
Gender	Male	8.8
	Female	8.1
Age groups	15-29	8.9
	30-44	10.1
	45-59	7.5
	60-65	5.2
Ethnic groups	Bulgarian	7.6
	Turkish	6.3
	Roma	35.8
	Other	8.2
Level of education	Primary and lower	14.3
	Secondary	8.1
	Tertiary	5.7
Income groups (income per person in the household, BGN)	Up to 200	15.0
	201-300	10.2
	300 and above	8.3

More than a half of the respondents (52.5%) state that they cannot afford themselves one week annual vacation out of home – those are mainly persons from villages and small towns, of higher age groups (above 45 years of age, and mainly those above 60), with lower education and income, predominantly form the Roma ethnic group, but not only. More than one third (37%) declare that they cannot allow themselves to eat meat or fish (or comparable vegetarian food) every second day – the profiles of these respondents are similar. Almost half of the respondents state that they cannot afford themselves regular visits to a dentist (49.3%). These are elderly persons with lower education and income, predominantly form the Roma ethnic group, and not only. As for the existing regional disparities in this respect, it has to be mentioned that worst is the situation in South-West region, in the villages, but also in the capital of the country (Table 11).

Table 11

Can you afford, if you wish, to pay for: (Answer “Yes”) (%)

Groups		One week annual vacation out of home	Eat meat or fish every second day	Regular visits to a dentist
Total		47.5	63.0	50.7
NUTS II	North-West Region	41.6	62.8	49.0
	North-Central Region	45.5	61.1	56.3
	North-East Region	43.0	60.5	48.1
	South-West Region	52.7	63.7	45.7
	South-Central Region	48.1	69.9	57.4
	South-East Region	46.1	56.0	50.3
Towns-villages	Capital Sofia	59.7	71.0	43.7
	Big towns	50.9	66.8	62.4
	Small towns	48.0	62.0	50.4
	Villages	33.6	53.4	40.8
Gender	Male	49.2	64.5	51.6
	Female	45.7	61.5	49.7
Age groups	15-29	50.6	70.2	59.7
	30-44	54.9	66.7	53.8
	45-59	44.9	60.8	46.8
	60-65	24.4	40.7	29.9
Ethnic groups	Bulgarian	50.0	65.5	52.7
	Turkish	33.7	50.4	41.5
	Roma	18.1	33.5	20.0
	Other	40.5	58.7	52.9
Level of education	Primary and lower	25.0	50.6	37.1
	Secondary	43.7	59.5	45.5
	Tertiary	70.3	79.1	71.5
Income groups (income per person in the household, BGN)	Up to 200	25.0	45.8	33.7
	201-300	49.8	67.7	55.3
	300 and above	77.1	86.1	69.8

The survey’s results demonstrate the perception of inequality in different areas of life in the country – labour market participation and working conditions, participation in education, access to healthcare services and to leisure, consumption, etc., which is an important driver of migration: to look for higher living standard and payment.

Inequality and deprivation of Bulgarians abroad ((in) equality as a result of migration)

According to the **mobile** respondents, as the survey’s results show, there are differences between their social status in Bulgaria (before departure abroad) and in the host country. Being abroad, the percentage of those who are employed in private companies, self-employed, agricultural producers and who care for relatives increases, while before the departure some of them were employed in public companies, ran or managed a private company, were students or unemployed (Table 12).

Table 12

What did you do abroad and before you went abroad? (%)

	Activity abroad	Activity in Bulgaria before departure
Employed in a private company	64.4	45.1
Employed in a public company	1.6	7.5
Run/manage a private business	2.1	4.3
Self-employed	3.3	1.4
Agricultural producer	3.1	1.0
Student	6.5	16.5
Unemployed	2.8	19.6
Taking care of relatives/close persons	5.1	0.2
Other	11.1	4.3

Migration is one of the channels to accumulate knowledge, skills, experience, i.e. human capital, in order to improve the socio-economic status of the migrants. As it can be seen by the study's results this is not the case for many of the Bulgarian migrants. The share of those who were employed in a private or state (municipal) company before their departure abroad decreases after they come back to Bulgaria. At the same time sharply increases the share of unemployed persons and to some extent that of the self-employed (Table 13). A possible explanation of the existing difficulties in re-entering the home labour market is that they have lost qualification and skills abroad and move to a lower qualification group (confirmation of such a conclusion could be found in the data about the changes in the occupational status of the migrants, presented further in this paper).

Table 13

Changes in employment status of the migrants before, during and after their stay abroad (%)

	Before departure	Abroad	In Bulgaria after a stay abroad
Employed in private/public company	52.6	66.0	39.5
Run/manage private business	4.3	2.1	4.2
Self-employed	1.4	3.3	2.6
Agricultural producer	1.0	3.1	0.9
Student	16.5	6.5	6.8
Unemployed	19.6	2.8	36.8
Taking care of relatives/close persons	0.2	5.1	-
Other	4.3	11.1	9.3

At the same time, the intention to go abroad for higher payment was fulfilled for not a small part of the Bulgarian migrants. The income in the host country is higher than the one in Bulgaria for a sizable percentage of them (Table 14).

However, the higher payment abroad is accompanied by changes in the areas of economic activity, occupations and professional realisation. The percentage of the migrants who work abroad in agriculture, accommodation and food service activities, and household/family activities (assistant, cook, gardener, etc.), increases significantly in comparison with their previous activity in Bulgaria. Sizable is the increase of unskilled and skilled agricultural

workers and of those caring for persons while the percentage of managers and professionals decreases (Table 15). The existing disparities between previous (in Bulgaria before departure) and current (abroad) activities and occupations create conditions for loss of qualification for many migrants in the host country, as mentioned before.

Table 14

What was your approximate personal income per month during your last stay abroad and in Bulgaria before you went abroad (in BGN)? (%)

	Income abroad	Income in Bulgaria
I had no income	1.2	26.3
Up to 1000	16.1	71.0
1000-2500	62.1	2.8
Above 2500	20.7	-

Table 15

What did you work and in what position abroad and in Bulgaria before you went abroad (main areas of economic activity) (%)

	Activity abroad	Activity in Bulgaria before departure
Economic activity		
Agriculture, forestry and fishing	21.1	5.2
Manufacturing	5.1	6.5
Construction	19.6	18.6
Trade; repair of motor vehicles	6.8	14.1
Accommodation and food service activities	14.0	8.8
Transportation and storage	6.1	5.4
Public service activities	8.3	7.3
Household/family activities	13.1	2.0
Public administration and defence	0.3	1.9
Education	0.7	2.1
Human health and social work activities	2.5	3.2
Occupations		
Managers	3.1	4.1
Professionals	4.6	12.0
Service and sales workers	24.5	26.0
• of which personal care workers	9.3	1.5
Skilled agricultural, forestry and fishery workers	9.8	5.0
Crafts and related trades workers	22.7	29.0
• of which building workers	16.1	19.0
Plant and machine operators	6.0	8.3
• of which drivers	5.0	6.5
Elementary occupations (requiring no qualification)	25.1	7.7
• of which agriculture, forestry and fishery labourers	10.3	1.3

Not a small part of the Bulgarian migrants declare that they are deprived in the local *labour market* in the host country because they are foreigners. About 40% of the respondents claim

that their chances to get a job are lower compared to local people. These are mainly lower educated persons, from the Roma ethnic group, but not only (Table 16).

Table 16

Have you come across any of the following difficulties during your work abroad because you are foreigner: (Answer "Yes") (%)

Groups		Lower chance to get a job	Lower payment for the same job	Occupation which requires lower qualification than the acquired	Crude attitude at workplace
Total		39.9	58.0	43.7	14.9
NUTS II	North-West Region	34.2	62.2	57.3	10.1
	North-Central Region	45.2	61.0	45.8	14.9
	North-East Region	41.2	56.3	41.4	21.6
	South-West Region	29.9	50.4	33.2	17.8
	South-Central Region	35.1	57.3	39.2	8.2
	South-East Region	53.9	64.5	53.2	15.7
Townsvillages	Capital Sofia	25.7	34.8	23.0	19.2
	Big towns	38.3	56.3	42.8	15.0
	Small towns	44.3	61.3	48.2	10.5
	Villages	43.7	66.3	48.5	17.4
Gender	Male	39.9	58.8	41.4	15.3
	Female	40.1	56.5	48.4	14.0
Age groups	15-29	37.1	62.9	44.4	12.1
	30-44	38.9	55.4	45.8	13.9
	45-59	46.3	58.6	39.6	19.4
	60-65	35.5	51.5	45.2	21.6
Ethnic groups	Bulgarian	38.4	57.4	44.3	14.2
	Turkish	39.6	57.3	36.5	8.7
	Roma	66.5	64.5	52.1	33.5
	Other	27.1	68.2	31.2	21.6
Level of education	Primary and lower	57.1	68.5	50.1	25.7
	Secondary	39.6	58.5	41.1	14.4
	Tertiary	33.1	52.1	47.8	11.4
Income groups (per capita, BGN)	Up to 200	48.8	62.9	41.8	10.8
	201-300	51.7	69.7	57.7	27.4
	300 and above	43.3	60.1	43.6	21.4

The predominant part of the emigrants (58%) state that they receive lower payment, compared to local people, for the same job – mostly young people and lower-educated persons (Table 16).

More than 43% consider that they get jobs and positions which require lower qualification than their own (predominantly women, lower-educated, but also highly educated persons) and about 15% declare that the employers/superiors treat them worse than the local people (persons from higher age groups, men, lower educated, from the Roma ethnic group) (Table 16).

Certain regional disparities are also observed – comparatively higher is the percentage of the deprived persons originated from small towns and villages in Bulgaria (Table 16).

More than 45% of the migrants were employed without a contract – mainly men, low-educated persons, from small towns and villages, from the Roma ethnic group (Table 17).

Table 17
Have you had any of the following cases during your work abroad?
(Answer “Yes”) (%)

Groups		Work without a contract	Partly or fully unpaid social insurance by employer	Overtime work without compensations
Total		45.5	41.1	40.7
NUTS II	North-West Region	62.4	61.9	55.1
	North-Central Region	50.6	48.8	52.8
	North-East Region	37.6	43.8	40.6
	South-West Region	29.8	25.2	21.6
	South-Central Region	47.5	35.3	41.5
	South-East Region	55.0	45.9	44.7
Townsvillages	Capital Sofia	2.8	5.1	7.3
	Big towns	39.9	37.2	36.6
	Small towns	49.7	44.0	46.9
	Villages	66.7	57.8	53.5
Gender	Male	46.9	43.5	42.2
	Female	42.8	36.1	37.6
Age groups	15-29	43.0	33.4	40.0
	30-44	46.2	44.7	41.3
	45-59	47.0	44.2	40.6
	60-65	47.2	36.5	37.5
Ethnic groups	Bulgarian	45.9	40.0	39.8
	Turkish	35.3	48.8	41.9
	Roma	59.0	41.3	50.7
	Other	39.4	46.1	39.4
Level of education	Primary and lower	66.4	61.5	60.3
	Secondary	47.3	42.1	42.5
	Tertiary	31.4	29.1	26.9
Income groups (per capita, BGN)	Up to 200	64.1	54.7	45.3
	201-300	43.2	44.0	48.4
	300 and above	49.8	49.6	45.7

Almost the same are the percentages of the respondents who state that they have had problems with the insurance payments by the employers (41.1%) and with overtime work without compensations (40.7%) – mostly men, from small towns and villages, low educated, from the Roma and the Turkish ethnic groups (Table 17).

Between 10 and 18% of the Bulgarian *students* who study or have studied abroad state that they have noticed some kind of a discrimination attitude – by the administration at school,

by lecturers, other students or local community (Table 18). However, none of the respondents declares any kind of refusal of access to services or educational opportunities during their study abroad.

Table 18

Have you come across discrimination attitude during your study abroad?
(Answer "Yes") (%)

Groups		By the administration at school	By lecturers	By other students	By local community
Total		11.1	18.2	16.9	10.4
NUTS II	North-West Region				
	North-Central Region				
	North-East Region	19.3	19.3	19.3	-
	South-West Region	24.9	36.0	32.0	11.2
	South-Central Region	-	18.5	18.5	18.5
	South-East Region	-	-	-	26.0
Townsvillages	Capital Sofia	30.9	44.8	39.8	13.9
	Big towns	5.6	5.6	5.6	-
	Small towns	-	15.0	15.0	29.9
	Villages				
Gender	Male	-	10.5	19.5	19.5
	Female	17.5	22.7	15.3	5.2
Age groups	15-29	13.6	25.1	17.6	11.4
	30-44	10.4	10.4	23.5	13.1
	45-59	-	-	-	-
	60-65	-	-	-	-
Ethnic groups	Bulgarian	11.1	18.2	16.9	10.4
	Turkish	-	-	-	-
	Roma	-	-	-	-
	Other	-	-	-	-
Level of education	Primary and lower	-	-	47.6	-
	Secondary	25.2	39.2	23.6	14.0
	Tertiary	6.6	11.7	10.2	10.2

While benefiting from relatively higher income abroad (compared to that in Bulgaria), the perception of a not small part of the Bulgarian migrants is that they are a deprived group in the destination countries in different respects, especially as it concerns the access to employment, working conditions and attitude of employers. The existing disparities between the occupations of migrants in Bulgaria and abroad, sizable part of which require lower qualification than their own, also point at inequality as a result from migration.

Remittances as a possibility for decreasing inequality and improving the socio-economic status in Bulgaria

The remittances, which migrants send back to their origin country, are considered as a factor that favours the socio-economic development, the increase in consumption, savings and investment in the respective home country. According to World Bank data¹⁵, the money transfers of Bulgarian emigrants amount to about USD 1.5 billion annually (for the period 2007-2013). Similar are the data of the Central and Eastern Europe Development Institute¹⁶ which show an amount of EUR 1.127 million for 2012 (or 2.8% of the country's GDP). It is important, however, what this not small amount of money is used for, in order to assess whether and how it influences the inequalities in the sending countries.

The results from the survey (2013) show that 47.8% of the Bulgarian *migrants* claim that they have transferred money to their close people in Bulgaria during their stay abroad. They usually transferred about, or less than, a half of their income (Table 19).

Table 19

What part of your income have you usually transferred to your close people in Bulgaria? (%)

Very small part	21.8
Less than a half	22.3
About a half	23.1
More than a half	11.1
Very large part	4.2
Almost all income	3.7
I had no income (someone else provided subsistence to me)	13.8

About 20% of the *non-mobile respondents* state that they have received money from abroad. These transfers constitute more than a half of the household monthly income of more than 25% of the people who receive money from abroad (non-mobile population – potential and non-migrants) (Table 20). Generally, the incomes of the households of all the respondents consist mainly of: earnings related to employment (58.5%), pensions (18.5%), child allowances (10%), and 3.7% remittances (a higher percentage than those of unemployment benefits (3.3%) and social assistance (2.8%), for example).

Table 20

What part of the household monthly income is the money received from abroad? (%)

Very small part	44.0
Less than a half	20.6
About a half	10.2
More than a half	9.3
Very large part	6.8
Almost all income	9.2

¹⁵ World Bank. Annual remittances data, Inflows, April 2014.

¹⁶ Central and Eastern Europe Development Institute. (2014). Migration in the 21st century from the perspective of CEE countries – an opportunity or a threat? Warsaw.

The predominant part of the transfers has been used in Bulgaria for consumption and smaller parts for paying loans, education and medical treatment. Only 3.7% of those persons have used the money for saving and 1.4% for doing business (Table 21). The main sectors of economic activity in which transfers were invested to develop own business are the Services sector (75.7%), followed by Agriculture (12.6%), and Construction (11.7%).

Table 21

Did you use some of the money for any of the following:* (%)

Own business	1.4
Consumption	61.7
Paying loans	11.3
Saving	3.7
Education	9.6
Medical treatment	9.1
Purchasing vehicles	2.2
Purchasing a real estate	0.9

* Multiple response

Not a small part of the Bulgarian migrants have sent money to Bulgaria, most of which has been spent for consumption and paying loans. Despite the fact that this money has not been spent as investment in business to support the economic development in the country, it has created conditions for improving the material status and to some extent educational and health status of the migrants' households and relatives, and probably for decreasing social inequality.

Conclusions

There are different causes for, and effects from, migration, but it cannot be denied that the economic and social inequalities, as well as the opportunities, are significant determinants of migration. Inequalities between countries, but also within the origin countries generate migration. The existing inequalities of conditions and of opportunities between Bulgaria and the average EU level (and most of the other EU member-states) constitute a strong promoter of Bulgarian external migration. The unfavourable socio-economic conditions in Bulgaria and the lower level of satisfaction with the standard of living (compared to the EU average) form another driver of migration. All these inequalities comprise one of the most important determinants of Bulgaria as a sending country. The 2013 survey's results demonstrate the perception of inequality in different areas of life in Bulgaria – labour market participation and working conditions, participation in education, access to healthcare services, material living conditions, consumption, access to leisure, etc., which stimulate many people to look for a higher living standard and payment abroad.

The relationship between inequality and migration, however, is two-way. Social differentiation promotes migration, but it is not obligatory for migration to reduce inequality. Being abroad Bulgarian migrants feel themselves deprived to a certain extent,

especially as it concerns the access to employment, working conditions and attitude of employers, while benefiting from higher income compared to that in Bulgaria. According to the survey's results there are disparities between the occupations of migrants in Bulgaria and in the host countries, sizable part of which require lower qualification than migrants had acquired. The higher payment abroad is accompanied by changes in the areas of economic activity, occupations and professional realisation of migrants.

Migrants' transfers are a premise for reduction of social inequality in sending countries. Many Bulgarian migrants send money to Bulgarian and as the survey's results show most of it has been spent for consumption and paying loans. The ways of use of migrants' money transfers facilitate the improvement of the material, as well as to some extent the educational and health status of the migrants' households and relatives, and possibly the decrease of social inequality, while not being of sizable support to investment and business development in the country.

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