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**Exploring the socioeconomic contributions that Filipinos in the Western Cape  
make to the development of their host and home countries**

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A minor dissertation submitted in partial fulfillment of the requirements for the award  
of the degree of Master of Social Science in Social Development

Faculty of the Humanities  
University of Cape Town  
May 2013

**COMPULSORY DECLARATION**

This work has not been previously submitted in whole, or in part, for the award of any degree. It is my own work. Each significant contribution to, and quotation in, this dissertation from the work, or works, of other people has been attributed, and has been cited and referenced.

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Date: \_\_\_\_\_

27 May 2013

## **ABSTRACT**

Using a qualitative approach, the study sought to investigate the socio-economic contributions that Filipinos in the Western Cape make to the development of South Africa as well as to the Philippines. Seventeen semi-structured, in-depth face to face interviews were conducted with three key informants including the Philippine Honorary Consulate and fourteen Filipino household representatives. Four of these household representatives also took part in a focus group discussion. An interdisciplinary theoretical framework was adopted taking into account the broader Migrant-Development Nexus as well as various Social Development and South-South Cooperation theories. The main findings were:

- The migrant respondents viewed themselves as an empowered migrant group in terms of the necessary resources, conditions, and motivation, to engage in development.
- A quantitative gauge of migrant economic contributions proved difficult to assess given the small sample and the reluctance to divulge their financial statuses.
- Inconsistent remittances on the part of migrants may be due to ambivalences concerning their resettlement in the Philippines.
- The migrant group contributes to the host country through their taxes, enterprises, skills and social initiatives.
- Existing conflict between the two sub- groups within the local migrant community has jeopardized the community's potential for effective participatory development.

One of the main recommendations included further substantive research into the Filipino migrant population in South Africa using a mixed methodology approach. Furthermore a coordinating body was broached to generate greater cohesion as well as promote socio-economic initiatives.

## **ACKNOWLEDGMENTS**

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which has been as challenging as it has been rewarding.

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## **LIST OF ABBREVIATIONS USED**

BSP	Bangko Sentral ng Pilipinas (Central Bank of the Philippines)
CFO	Commission on Filipinos Overseas
D2D	Diaspora to Development Programme
FDI	Foreign Direct Investors
HDR	Human Development Report
IOM	International Organization for Migration
ODA	Overseas Development Assistance
OECD	Organisation for Economic Co-operation and Development
OFW	Overseas Filipino Workers
POEA	Philippine Overseas Employment Agency
SSC	South-South Cooperation
SSM	South-South Migration
Stats SA	Statistics South Africa
UNDESA	United Nations Department of Economic and Social Affairs
UNESCO	United Nations Educational, Scientific, and Cultural Organization

# CHAPTER ONE: INTRODUCTION

---

## **1. INTRODUCTION**

This chapter introduces the study on:

*Exploring the socioeconomic contributions that Filipinos in the Western Cape make to the development of their host and home countries*

A background of the study is presented as well as the statement of the problem, the rationale and significance, research questions, objectives, concept clarification, ethical concerns and reflexivity. A brief chapter outline of the report is presented at the end of this chapter.

### **1.1 BACKGROUND OF THE STUDY**

Globalization as a force for social change has had a tremendous social change impact on the international development landscape. The pervasive inequality that exists within and between countries points to the inadequacy of orthodox development principles. These highlight the need for innovative and holistic approaches to development (Meier, 2001). Special emphasis is placed on addressing holistic human needs, including the contexts that define these. Improvement in technology has facilitated the flow of goods and information across borders. Yet the accelerated rate at which change takes place in the international level also impacts the local level (Grant & Short, 2002). Thus increased globalization inevitably places migration at the forefront of the international development discourse.

The World Migration Report 2009 estimates a total of 214 million international migrants defined as those living in countries outside their countries of birth (United Nations, 2011). Of these, 73.6 million migrated between developing countries, in contrast to 72.7 million who migrated from South to North countries (Henning, 2011). It is anticipated that South-South Migration (SSM) characterises the next major shift in world migration patterns (Williamson, 2006). Simultaneous to this is the phenomenon of increased South-South Cooperation (SSC). These initiatives promote collaboration between developing South countries, providing an alternative to traditional North-South aid relationships.

Thus prospects for SSC are worth exploring in the light of the present context when human mobility within the developing world is on the rise. Migrants could serve as the impetus for greater South-South Cooperation. After all, they signify the outcome of political and economic forces that define the “push and pull factors” of migration (International Organization for Migration [IOM], 2004). Widespread political and economic instability induce the movement of people from their home countries (United Nations Development Programme [UNDP], 2009). In turn, the flux of migrants to other countries can also be a source of economic development for both host and home countries (Adepoju, 2008). At a micro-level, social and economic opportunities are expanded for such migrant families. Migration affords them a certain quality of living that would not have been realised in the face of structural barriers in their native land. At the macro-level, migrants fuel their home country’s economy through remittances, while prompting productivity and consumption in their host countries.

These realities pose questions as to how development may be fostered through migrants. They are suitably positioned to contribute in “[deepening] mutual understanding and co-operation, and improving mutual public awareness”, which are crucial to better SSC initiatives (Soko, 2006:25). Migrant transnationalism offer opportunities for this (Faist 2008; Kelly & Lusia, 2006). Through the social relations they establish in both countries, migrants are able to foster links and facilitate exchange between their host and home countries (Basch, Glick-Schiller, & Szanton-Blanc, 1994; Faist 2008). Access to informal institutions (such as historical bonds and cultural affinity) of both countries suggests greater possibilities for creative measures in SSC (Kornegay, 2009; Soko, 2006; Keet, 2006). Models that utilise organised popular forces not fully dependent on the state are especially key in counteracting “sub-imperialist” tendencies associated with the state (Keet, 2006:33). Migrant groups can then form part of civil society, serving to counter-balance power issues of the concerned states. The study then tries to establish a link between the micro and macro levels of the migration-development nexus, in an effort to explore novel ways of actualising cooperation between developing host and home countries—at the core of which lies the migrant community.

## **1.2 STATEMENT OF THE PROBLEM**

Drawing from the aforementioned discussion, this study focuses on the Filipino migrant communities in the Western Cape and their socio-economic contribution to both the Philippines and South Africa.

Existing similarities and complementarities in the two countries' political, economic and social landscape, make for an interesting case to investigate and to explore possible opportunities for increased cooperation between these two interregional developing countries. The Philippine Embassy in South Africa and the Honorary Consulate in Cape Town estimates that the target group in the Western Cape consists of around 200 settlers. Such information is not as readily available given that some have already acquired South African citizenship. The general impression is that this Filipino migrant group has a relatively better living standard than most other migrant groups in South Africa, as well as in the greater Philippine diaspora. It could be presupposed that unlike moving to a "developed country", there are bigger risks with fewer opportunities, in moving to a country like South Africa. Admittedly the number of Filipinos in South Africa is less when compared to those in other host countries, nor is it comparable to other migrant groups in Cape Town. However such a study could highlight how a small group of migrants can make a difference in both their host country and their country of origin.

## **1.3 RATIONALE AND SIGNIFICANCE**

The study aspires to broaden the thematic and geographical scope of existing migrant literature in the Philippines as well as in South Africa. As a significant issue in the Philippines, migration has elicited extensive literature on the subject. A persistent narrative is that of overseas Filipinos' burdens for better economic opportunities at the cost of personal persecutions (de Guzman, 1993). While the reality of this cannot be denied in some instances, it is worth approaching Filipino migrants from an empowerment perspective. Assessing the role of migrants beyond their economic capacities would include their social contributions and sense of agency. Adopting such an approach caters to the need to integrate migrants into the national development plan (Asis, 2008). Focusing on this positive perspective of empowerment and agency may

shift the gaze from the guilt and stigma usually associated with leaving one's country (Harris, 2012; Ward & Styles, 2012). Past studies have focused on Filipinos in the Middle East and North America where their economic contribution has been noted (Asis, 2008). Changes in the international landscape with greater South-South migration taking place points to the need to expand the discourse. Financial crises and domestic issues that plague traditional host countries pave the way for emerging economies such as South Africa to provide migrants with alternative economic hubs. The study then seeks to advance a new phase in Philippine migrant literature, in light of increased south-south migration. It also hopes to build on the history of the first wave of Filipino migrants who first came to South Africa in the 1800s (Walker, 2002).

From the host country perspective, the study's focus also allows for the expansion of the South African migrant discourse. It is all the more necessary given South Africa's rise in international significance as a global player, juxtaposed with increasing south-south migration at the global scale. Being the region's largest economy, South Africa is host to migrants from all over the Africa. Already it has the highest concentration of asylum-seekers in the world (United Nations High Commissioner for Refugees [UNHCR], 2011a). However the presence of voluntary migrants from the Philippines could also attest to the country's increasing international significance beyond the African region. The distinction between voluntary and forced migration (that of refugees') is key to taking the necessary "more nuanced approach" to the under-researched topic of south-south migration (Bakewell, 2009b:2; Hujo & Piper, 2007). Recent xenophobic attacks in South Africa also manifest the gravity of migration's domestic repercussions. Persisting frustrations over high inequality and social disintegration in the country do little to mitigate migrant concerns (National Planning Commission, 2011). There exists a perception against foreigners where they serve as "scapegoats ... for unemployment, crime and other social evils" (Govender, 2009:54; Khan 2007). Consequently, this alongside the lack of public information and weak state capacity hinders the effectiveness of handling the negative repercussions of migration (Khan 2007). These perceptions could be transformed with a view of migrants' potential in narrowing inequalities through job creation and other development initiatives.

It is through these that examining the Western Cape Filipino migrant community's socio-economic contributions seeks to enrich migrant literature. This is with the greater view of influencing policymaking, practices and public perception, within both countries and beyond. It aspires to be of value to relevant state organs in addressing migration and international development. This could impact on mobilising the migrant community, as well as identifying novel measures in strengthening ties between host and home countries. With political and economic cooperation in place between the two countries, the migrant group presents an opportunity to further social linkages in line with the broader notion of enhanced south-south cooperation.

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#### **1.4 MAIN RESEARCH QUESTIONS**

In pursuing this study, the following research questions were asked:

- i. What is the socio-political-economic context of the Philippines and South Africa in relation to the issue of migration?
- ii. What is the socio-economic profile of Filipinos living in the Western Cape?
- iii. How do they contribute to the social and economic upliftment of their community in South Africa?
- iv. How do they contribute to the social and economic upliftment of their community in the Philippines?
- v. How can these contributions be maximised to further Philippine-South African cooperation?

#### **1.5 MAIN RESEARCH OBJECTIVES**

Based on the research questions, the following objectives were formulated:

- i. To discern the socio-political-economic context of the Philippines and South Africa in relation to the issue of migration
- ii. To establish a socio-economic profile of Filipinos living in the Western Cape
- iii. To identify their contributions to the social and economic upliftment of their community in South Africa
- iv. To identify their contributions to the social and economic upliftment of their community in the Philippines
- v. To determine how these potential contributions can be maximised to further Philippine-South African cooperation

As a minor dissertation, the study parameters were carefully set out in keeping with these objectives.

## **1.6 CONCEPT CLARIFICATION**

The following section seeks to clarify key concepts used in this study.

- **Migrants**

The International Organization for Migration (IOM) cites the term migrant in reference to people who made the decision to move “for reasons of ‘personal convenience’ and without intervention of an external compelling factor” with the view of “better their material or social conditions and improve the prospect for themselves or their family” (2004: 40). This broad definition encompasses economic migrants, skilled migrants, temporary migrant workers, actual immigrants and excludes refugees. Refugees are driven out of their countries due to potential persecution, violence and threats to their safety. For purposes of this study, the broad definition of migrants would be used to denote Filipinos who have either settled in South Africa permanently or those planning to return to the Philippines.

- **Migration-development nexus**

This nexus refers to existing linkages between international migration and development. More specifically, it considers the developmental issues that prompt migration. Conversely, this also looks at how migration impacts on development. Having recognised these mutual impacts, it then takes the discussion further by exploring opportunities for mutual benefit. Amongst the themes that fall within the ambit of this research are remittances, diaspora, skills transfer and policy.

- **Remittances**

This refers to cross-border financial flows arising from migrant transactions. Purposes for these are usually for household consumption and access to basic needs for welfare, such as education and healthcare (UNDP, 2009). At the macro-level, it has increasingly become a measure “for assessing impact of migration on developing countries” (Hujo & Piper, 2007:23).

- **South-south cooperation (SSC)**

South-South Cooperation (SSC) is defined as efforts initiated by developing countries to collaborate on political, economic, social, cultural and technical matters, with the aim of furthering development in their countries (UNDP, 2011b). Such development is usually attained through an exchange of knowledge, skills, expertise and resources, spanning various levels—from bilateral to interregional. It is a multi-stakeholder process, which seeks to involve actors from various sectors. This includes those from public, private, non-governmental organisations as well as individuals. Drawing from this, the research seeks to uncover how Filipino migrants in South Africa may promote SSC in the context of increasing South-South Migration (SSM).

- **South-south migration (SSM)**

South-south migration pertains to the movement of people between developing countries situated in the global south (Ratha & Shaw, 2007). Bakewell (2009b) defines the global South using three indices, under which both the Philippines and South Africa qualify: regional geographic grouping (Asia and Africa), international economic performance (medium income countries), and Human Development Index (medium). Thus the Philippines as a country of origin for the migrants, and South Africa as a destination country, permit the use of South-South migration concept in this study.

- **Socio-economic contributions**

Socio-economic contributions pertain to initiatives that cater for both social and economic aspects of development. Within the migration discourse, economic contributions refer to financial remittances (IOM, 2004). Additionally, this can also refer to economic contributions to the host country through migrants' own employment as taxpaying citizens as well as employment creation. Social contributions of migrants include their actual involvement in social organisations in host countries as well as material donations. These include volunteering for social upliftment projects, community development, and charitable organisations. Other non-economic contributions include social and intellectual capital through networks, knowledge and ideas (Brinkerhoff, 2006).

- **Human development**

Human development is “the process of enlarging people’s choices” (UNDP, 1990:9). This is accomplished by creating conditions that would enable access to resources necessary for a good quality of life. Thus the Human Development Index (HDI) was developed as a measure of populations’ education, life longevity, and income. Special consideration is also placed on human autonomy. It is a view that regards people beyond means to economic ends, or passive beneficiaries of development. Rather, it advocates the empowerment of people so that they can take hold of their own development.

It is within this paradigm that the study will examine the Filipino migrant community’s role in development. This provides for a holistic definition of well-being beyond a purely economic focus and includes their ability to participate and contribute to development, even beyond their own personal needs. Their social contributions for example, could be regarded as the means through which they challenge the same structural barriers that prompted them to leave their home country.

## **1.7 RESEARCH ETHICS**

Ethical considerations are important throughout any research study and are central to the integrity of the study. Among the issues to be considered are informed consent, deception of subjects and/or respondents, potential harm to respondents, violation of privacy/anonymity/confidentiality, actions and competence of researchers, cooperation with contributors and sponsors, release or publication of the findings (Strydom, 2002).

- **Informed consent**

Strydom (2002) outlines the necessity of disclosing the study's goal, expected form of participation, procedures, possible impact and the researcher's competencies to the respondents. Once they have been given all the necessary details, they are then able to make an informed and conscious decision whether to voluntarily participate or withdraw from the study. In order to address this, information regarding the researcher's background and the study's purpose was conveyed when initial contact was made with the target group. This information was given again in written and oral format prior to conducting the interview. A letter requesting participation was also supplied prior to data collection. It introduced the author as a research student working towards her postgraduate degree in the university and included some of her relevant particulars. A brief overview of the goals, terms, and intentions for undertaking such a study were outlined. More specifically, it discussed the use of information, as well as how these ethical considerations will be upheld. The possibility of refusing to participate was also clearly set out.

- **Potential harm to respondents**

Information disseminated about the study can also minimize potential harm to participants. Researchers are to be cognizant of potential harm to respondents, which could manifest in various ways. This can take the form of, but is not limited to, actual physical injury. Emotional harm, as well as other forms of harm may severely alter the respondents' lifestyle, such as their relationships, and employment, among others (Strydom, 2002).

For this study, the Filipino households that were sampled were limited to legal migrants in South Africa. This is in order to safeguard against potential immigration conflicts that may arise from the disclosure of such information. The study would adhere to IOM's definition of a documented migrant, as one "who entered a country lawfully and remains in the country in accordance with his or her admission criteria" (IOM, 2004:20). The researcher was careful to ask questions in such a manner that would bring about no possible harm to the respondent.

- **Deception of subjects and/or respondents**

Information given to the participants would also have to be free from deceptive measures that seek to ensure their participation at all costs. Deception can take the form of manipulating or withholding pertinent information regarding the study, especially with respect to its purpose and impact on the respondents (Judd et al., in Strydom, 2002). Thus, opportunities to ask questions regarding this study, prior to and after the interview, were presented as well. Those raised during the interview were clarified in an unambiguous manner.

- **Violation of privacy/anonymity/confidentiality**

Strydom (2002) distinguishes between privacy and confidentiality. Privacy pertains to one's freedom in choosing the extent to which one chooses to divulge information regarding his/her behaviour, attitude, beliefs, among others. Confidentiality is the limit to which others can access information that was shared by a respondent.

In keeping with confidentiality, household head respondents were not identifiable. Aliases of favorite famous Filipino personalities were used in accordance to respondents' preferences. The use of these pseudonyms was also retained during the collective interview, with name tags used for identification during the discussion. Key informants were asked whether they wished to be identified for credibility of information. Recording tools used clandestinely also fall under this category. In this respect the researcher contracted with respondents and got permission for the use of a device for verbatim recording and its transcription, as part of data collection procedure.

- **Cooperation with contributors**

Ethical concerns may arise where sponsors influence the course or results of the study (Strydom, 2002). However it must be noted that no external sponsors financially support the author and her work.

- **Release or publication of the findings**

The value of the study only materializes when shared. In this regard subjects will be informed of the findings without risking other ethical concerns mentioned before, such as confidentiality. It is also through that their participation is recognized, while extending gratitude for it (Strydom, 2002). The findings will be ethically presented in an objective manner and reflecting what the respondents' actually said.

- **Competence and actions of the researcher**

The researcher's competence in handling the findings objectively is a crucial ethical consideration as well (Strydom, 2002). At the same time, Loewenberg and Dolgoff (in Strydom, 2002) also emphasise the need for a cultural understanding and sensitivity towards the target group. As a fellow Filipino who was raised and educated in the Philippines, the researcher sought to balance cultural sensitivity for this group while maintaining academic objectivity. Efforts in ongoing reflexivity and impartiality were also discussed with the supervisor.

## **1.8 REFLEXIVITY**

Coming from the Philippines, my decision to pursue postgraduate studies in South Africa was motivated with prospects for pursuing cooperation between the two countries. My personal and academic experiences on the other hand have developed my interest in migration issues. Furthermore the research topic provided opportunities for an interdisciplinary discourse. Knowledge gained from my undergraduate degree in Political Economy, as well as theories/models gained from the Social Development Master's degree equipped me with various lenses with which to approach the research. Altogether, this research endeavour presented an exciting challenge to draw together many threads from various frameworks in order to understand the research problem in a holistic and integrated manner. Needless to say the subject matter also provided an area of convergence for my personal aims, interests and experience.

The macro-scale of issues, scope and studies associated with the topic further heightened my enthusiasm for such a research endeavour. However this also created challenges in maintaining a focused study, especially given the reality of certain constraints on the my capacity and resources and the fact that this is a minor dissertation. Streamlining an overwhelming amount of information proved to be personally challenging.

As a Filipino living in the Western Cape myself, I also took special care in balancing my interaction with the respondents during the research, where trust is gained without impudent familiarity that could compromise academic integrity.

Nonetheless I was greatly inspired by the support offered throughout the research. Reading through the interviews was especially moving. Their insights and actions that went beyond the study's requirements were a constant affirmation of my faith in the innate Filipino spirit of extending oneself onto others.

## **1.9 STRUCTURE OF REPORT**

The structure that the report takes is as follows:

Chapter 1: Introduction

Chapter 2: Literature review

Chapter 3: Methodology

Chapter 4: Discussion and analysis of findings

Chapter 5: Conclusion and recommendations

## **1.10 CONCLUSION**

This chapter introduced the study by presenting a general background of the topic, research problem, rationale, objectives, clarification of concepts, ethics and reflexivity.

The following chapter reviews existing literature relevant to the study.

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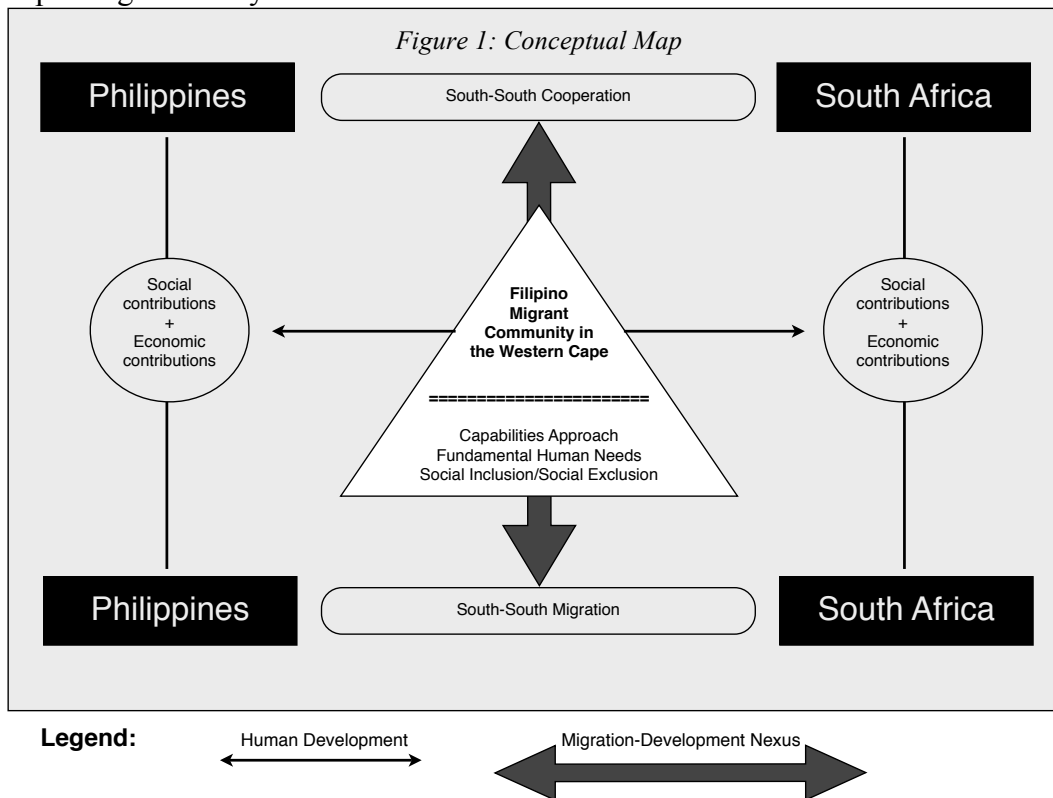
## CHAPTER TWO: LITERATURE REVIEW

### 2. INTRODUCTION

This chapter discusses existing work that is related to the research. It includes the theoretical framework, a contextual discussion of migration, and conceptual map. The latter seeks to illustrate the synergy between the study's concepts and context.

### 2.1 THEORETICAL FRAMEWORKS

The research is undertaken within a social development paradigm. The Migrant-Development Nexus—which has evolved to focus on migrants, their motives, and capacity to be agents of development—serves as the main framework for this study. Supporting these are a discussion of social development theories such as Social Inclusion/Exclusion, Fundamental Human Needs, and the Capabilities Approach. These theoretical approaches provide the lenses through which migrant issues can be examined in a holistic and critical manner. A developmental perspective of South-South Cooperation is also discussed in order to provide insight on the platform for realising their agency. Finally, the diagram below (Figure 1) sets out the conceptual map underpinning this study.



### **2.1.1 South-South Cooperation (SSC) Debates**

Jules & Sa e Silva (2008) discuss the approaches that different disciplines have employed in the South-South Cooperation discourse. The liberalist perspective of International Relations complements that of Development Studies. Together, these support the study's view of SSC as an opportunity to address global issues. Liberal International Relations recognizes the ability of states to work together toward a common goal. It elevates the discussion of state motives beyond power relations into that of rational cooperation. SSC is then positively viewed as a practical course of action in facilitating international transactions, as well as attaining development. Building on this is the Development Studies approach, which introduces conflict and functionalist theories. It puts forward the transformative potential that SSC presents against existing structural inequality and dependency in the international landscape. Thus seen from these perspectives, SSC provides the broader concept against which the migrant–development discourse could be framed. These South–South Cooperation debates pave the way for a more people-centred approach that emphasizes human agency in the face of political and economic structures. Such approach means that migrants are not just regarded as purely economic actors, but sociopolitical actors as well (Piper, 2009). By placing migrants themselves at the core of the study and capturing their perspectives, one is able to interrogate the migrant-development nexus at a micro-level.

### **2.1.2 Migration-development nexus**

The migration-development nexus serves as another overarching framework for this study. Links between migration and development is established in a variety of ways, ranging from migrant motivation, implications, and participation.

Migration has also been related to various developmental issues, primarily in economic terms. Since then, migration studies have expanded to include political crises, conflict situations, environmental degradation, youth/demography, human rights, gender equality, climate change, among others, all of which affect the pressure to emigrate (Piper, 2009). The following discussion however focuses on themes most relevant to the parameters of this study.

- Motivation: Push and pull factors for migration

Initially, migration flows highlighted the existing divide between developed and developing countries. The “push” and “pull” factors that fuel migration were linked to development and economic realities. Bleak economic prospects for a good quality of life resulting from policies in sending countries vis-à-vis opportunities available in receiving countries is a key dynamic in the decision to migrate. The period between the 1970s-1980s in particular saw international migration as “a sign of development failure”, where it served as the “means to escape an environment of institutional failure to deliver well-being and human security” (Hirschman 1970 in Faist, 2008:23). It points to the limitations of conventional developmental policies in alleviating global inequalities further emphasizing the migration-development link (Piper, 2009). This necessitates a discourse on migration’s implications for social development.

- Remittances: Economic and social resources for development

The migrant discourse has shifted its focus towards migration’s effects on development. Remittances emerge as key to developing home countries’ resource-generation, which must be critiqued within the broader context of states, communities, and households.

At the household level, it contributes to income, consumption and social protection while fostering investment in health, education, agriculture, small business, local development through social infrastructure investments and community projects (Hujo & Piper, 2007). Although economic remittances are seen as instruments for migrant engagement in development, these micro-scale dynamics also impact on the macro-level by fueling consumption and the economy through its multiplier effects (Bakewell, 2009a). The flow of foreign currency also serves to finance and stabilize a country’s balance of payments (Ramamurthy, 2003). In developing countries, these emerge as alternative means to poverty reduction rather than sole reliance on international aid (Piper, 2009; Williamson, 2006). Remittances have exceeded Overseas Development Assistance (ODA) and Foreign Direct Investments (FDI) in some countries, even proving more stable than FDI (Camroux, 2009). This is owing to a nature that is not only resistant and counter cyclic to economic recession, but one that has also increased sharply over the

recent years (Hujó & Piper, 2007). The value of remittances is said to be twice as much as OECD's annual aid budget, with 30% of developing country remittances coming from south-south migration in 2005 (Faist, 2008; Strauss, 2007).

By contextualising the study in south-south terms, it emphasizes a stronger alternative to north-south aid transactions for development. It is especially significant in a context where the lack of financial resources necessitate tapping into other kinds of resources. Crucial to the development process is an approach that integrates ethics, values and economic theory (Sen, 1999). Social remittances capture the exchange of non-financial factors such as ideas, values, behaviour, practices and experience (Faist, 2008; Hujó & Piper, 2007). Human mobility enables the flow of these practices possible. Through an expanded notion of development, “win-win situations” are created for people and states involved (Faist, 2008; Piper, 2009). Brain gain is manifested when one can share skills developed abroad through actual return, resettlement, and circular migration. The latter is exercised through short-term visits of migrants where ideas are circulated (Faist, 2008). These are made possible through the transnational space that migrants find themselves in. It applies not only to the location from where they take action, but also the area in which their contribution is received. Such transactions allow for an impact that is neither limited to their home or host countries, but to the development of both (Faist, 2008; Hujó & Piper, 2007).

- Empowerment: Migrant agency

The migrant–development nexus discourse has evolved from focusing on actions to the actors themselves. Emphasis is on migrant agency and their ability to steer conditions towards development (Bakewell, 2009a). Remittances manifest this given that they serve as a bottom-up, grassroots tool for development, operating at the micro-level. Migrants are the focus and serve as the main actors in carrying out “globalisation from below” (Faist, 2008:25). It is then worth exploring how their capacities may be manifested in different ways, expanding the tools at their disposal that would allow them to further contribute to development. Through migrant networks and organisation initiatives, the migrant community forms part of countries' civil society.

Aligned with principles of participatory development, civil society was seen “to supplement principles of social order such as the market and the state” (Faist, 2008:22). Neoliberal policy brought about the privatisation of social welfare services, which passed development as individual migrants’ responsibility (Piper, 2009). Migrants then serve as alternative contributors of products and services that state and market institutions fail to provide (Hujo & Piper, 2007). These include the fulfillment of basic needs and opportunities such as education, which eventually leads to the fulfillment of other needs (e.g.: employment).

The conditions and context that shape migrants’ capacity to realize their agency has also become central to the discourse. Cognizance of the different forms that migration takes, dependent on the mode of entry, and development level of destination countries is one approach to this (Piper, 2009). The latter is of particular significance to the study, given that South Africa is a developing country. These emphasize opportunities to streamline opportunities for south-south cooperation and south-south migration. The reciprocal link that migration creates between countries elevates the discourse “beyond the dichotomy of ‘developed’ versus ‘less developed’ countries” (Piper, 2009:98). It paves room for exploring migration’s developmental role in the context of south-south migration, given that existing research on non-economic migrant contributions focuses on high-skilled workers that migrate to the North (Hujo & Piper, 2007; Piper, 2009).

Such developments in the discourse show a holistic regard for migrants’ capacity in the realm of both economic and social contributions, while recognising the different spaces in which these may take place. Migrants are being affirmed in their role as agents of development in the South (Hujo & Piper, 2007; Faist, 2008). It underscores the opportunity that migration presents in national development strategies, rather than being a symptom of underdevelopment (Piper, 2009). Links between development and migration are reconceptualised towards mutual integration, and away from a control approach (Bakewell, 2009a). All this is in line with the need to progress towards a holistic and expansive approach to development.

The following social development theories support the emerging conceptual framework.

### **2.1.3 Fundamental human needs**

Manfred Max-Neef (1991) regards fundamental human needs as classifiable, finite and universal. Albeit differences in strategies for its pursuit exist, these needs remain true throughout time and cultures. Nevertheless these needs are complementary and interchangeable with each other. Such needs are identified as: subsistence, protection, affection, understanding, participation, leisure, creation, identity and freedom. The recognition and elaboration of the personal aspects associated with human fulfillment sets this work apart from its predecessors.

A more nuanced understanding of migration's complex realities is made possible through this holistic approach. It provides the space for the interaction of motivations and implications that define human welfare beyond the narrow scope of monetary gains in the migration discourse. Incorporating this line of thought is necessary if we are to consider international migration as an issue that goes beyond economics. The approach posits the idea that migrants may not only be seeking personal fulfillment and economic stability but may want to be participating and contributing to the development of the host country as well as their country of origin. All of this is crucial if we are to consider migrants' potential for being agents of social change. Enhancing the discourse on migrant agency is Amartya Sen's Capabilities Approach, which provides a lens through which one could analyse their capacities to become involved in development.

### **2.1.4 Capabilities approach**

Amartya Sen's Capability Approach (1985) takes on a more holistic and inclusive perspective with respect to human capabilities. His work on *Commodities and Capabilities* considers freedom in relation to one's advantage, differences in productivity, the multiplicity of factors that contribute to happiness, the balance of both materialistic and nonmaterialistic matters factoring in on human welfare, and how opportunities are distributed within society. He suggests various interventions that would address challenges to human potential in order to realise and maximise this.

Various implications and challenges surrounding migration make it a dynamic context for viewing it from a capabilities framework. On the one hand, the maldistribution of employment opportunities reflects the push and pull factors in both home and host countries. Migration then reflects capabilities in responding to these structural realities. Both social and economic aspects of the issue also point to the material and nonmaterial factors that enable human capabilities and their manifestation. This is particularly true with respect to the life satisfaction that they hope to gain from their decision to migrate. Finally it is worth exploring the extent to which Filipino migrants manifest their capabilities—first within their family, their immediate community, their countries of origin, and in their countries of adoption.

The freedom to choose in living one's life is central to the capabilities approach. Enshrined within such an approach is the necessity of fulfilling one's fundamental human rights. Furthermore social exclusion curtails one's rights thereby constraining one's capabilities. These serve as the basis for migrants' social inclusion in exercising their agency.

#### **2.1.5 Social inclusion/exclusion**

The concept of social exclusion/inclusion is relevant to migrant agency. It extends the discourse to opportunities for participation, encompassing other aspects of public human life: economic, behavioral, political and social processes (Burchardt, Le grand & Piachaud in Haralambos & Holborn, 2008). Thus it looks at one's belongingness, and therefore access to these processes. These also provide an opportunity for a multilevel analysis (e.g.: individual, family, communal, local, national and global scale), which complements the scale and level in which international migration takes place.

This is best manifested by the longstanding effects of exclusionary/inclusionary policies in both host and home countries, whether economic or social in nature. An example of this is the migration paradox of integration versus the division it renders on economic and geo-cultural terms (Munck, 2005). International migration allows for greater social inclusion at the macro-level where the permeability of national boundaries is emphasized.

However the ease of human mobility has resulted in increased border regulations. There is also the question of how the arrival of migrants affect the social fabric of communities, especially those that are marginalized (Piper, 2009).

Shaping social inclusion/exclusion are external constraints and internal choices that individuals deal with (Haralambos & Holborn, 2008). Within the receiving country context, the extent to which migrants and locals manifest their national identity have significant implications on the migrant group's belongingness in the host country (Esses et al., 2005). The amount of human, physical and financial capital that people possess defines the extent to which cultural factors can also influence human choices and reality.

For instance, financial capital at the macro-scale defines how market trends and policies affect job opportunities, which is a key push factor in sending countries. Another approach to this is also looking at migration as a measure in dealing with social exclusion (from employment), as well as a means for social inclusion (in accessing financial capital that is key to securing physical capital, such as health and nutrition). This is furthered by their contributions in extending capital to others through their developmental contributions.

Exploring these contributions in particular, present an interesting dynamic in gauging the migrant community's exclusion and inclusion in both countries, especially considering their transnational ties. After all, just as globalisation fosters disparity, so does it set the landscape for new forms of sociability to emerge (Munck, 2005).

The human ability to transcend these divisions is a key subject of this research. With a focus on migrants, it is manifested in their transnational means and ends to curb disparities through their contributions.

## **2.2 THE MIGRATION CONTEXT**

Given its transnational nature, migration is discussed in the context of a globalised international landscape, as well as nationally, with respect to the Philippines and South Africa. This multi-level analysis of migration is meant to ground the previously discussed theories within the realities of the study's scope and aims.

### **2.2.1 Migration in the international landscape**

Migration is the aspect of globalization which best “articulates the disjunction between market rationality and social stability” (Guhathakurta, Jacobson, & DelSordi, 2007: 202). Marked differences in standards of living between countries fuel migration incentives (Williamson, 2006). Scarce resources (e.g.: income, food, land) drive populations to seek living conditions better than those found at home. Yet it is a global phenomenon whose effects cut across disparities in country's development levels, driven by economic restructuring processes and demographic changes (Faist, 2008). It is also a complex phenomenon linked to humanitarian issues such as trafficking, modern-day slavery, gender-based violence. Altogether, these link migration to the broader discourse on poverty and development/social development.

Global progress have exacerbated factors that drive the phenomenon at a macro-level. Advancement in access to nutrition, healthcare, education and transport are among these. Demographic change in the developing world owing to improvements in nutrition and child mortality has created a generation of economically productive workforce. This is simultaneous with an aging population in developed countries, creating migratory space (Williamson, 2006). Economic benefits at the macro-level are also increasingly recognized by international financial institutions (Faist, 2008; Williamson, 2006). Aside from remittances, migration also eases domestic labour pressure, which expands employment opportunities in countries of origin.

However brain drain has also hindered development in home countries. The outward movement of healthcare and education professionals is a concern, in addition to diminished state revenues derived from taxes of income-earning skilled workers (Hujó &

Piper, 2007). From the host country perspective, this pertains to an expanded workforce. Yet there exists a wide perception that migrants compete with locals for employment and resources. This does not only compromise social integration but can fuel unrest as well. Immigration policies manifest this through policies that either induce or discourage immigration, mostly where highly skilled migrants are in demand, while increasing barriers for the low-skilled (Piper, 2009).

International organisations and instruments have been formed in an effort to address the various issues related to the phenomenon of international migration. Bodies such as the International Organisation on Migration (IOM) are in place. Human mobility is also a focus of the recently-launched United Nations University Institute in Barcelona. Additionally, policies emanating from the United Nations resolutions also contribute to setting the framework. In 2010, various resolutions were passed on migration, addressing related issues ranging from gender-based violence to climate change. The rise of the migration agenda was seen in various initiatives such as the Global Forum on Migration and Development and UNDP Human Development Report 2009. These sought to extend the space to different stakeholders while exploring ways to make international migration beneficial for development (Piper, 2009; Zlotnik et al., 2010).

The existence of these initiatives at the international level sets the tone for the creation of state policy on migration. Thus an understanding of migration at the global level is enhanced by discussing migration at a national level.

### **2.2.2 Migration and the Philippines as a sending country**

The Philippine diaspora reflects great diversity, spanning various professions, industries and stature. It has resulted from various phases of using migration policy instruments for development: labour export promotion, migrant welfare protection, and the integration of overseas Filipinos in national development processes through overseas voting (Camroux, 2008).

Labour export was part of the country's development strategy, originally conceived as a social safety valve aimed at addressing the global oil crisis of 1974, as well as the country's demographic explosion (Camroux, 2008; Tyner, 2009). The government employed a market-based strategy based on supply and demand principles that marketed Filipino labour to the world. Among the first government initiatives was the establishment of the Commission on Filipinos Overseas (CFO) in 1980, which catered to the welfare of Filipinos. Subsequently, Philippine Overseas Employment Agency was established. The establishment of a new constitution after the Marcos regime also recognizes overseas labor as within the jurisdiction of the state protection under Article XIII, Section 3 (Gonzales, 1998). In the same year the "Magna Carta of OFW Rights", otherwise known as Migrant Workers and Overseas Filipino Act (RA 8042), was passed leading to the creation of welfare and protection desks in Philippine embassies. Shortly thereafter the Overseas Workers Welfare Administration (OWWA) was established. The period of 1987-1991 also saw the legislative branch pass a total of 23 senate bills and 32 congress bills related to migration (Camroux, 2008).

Vasquez (1992) distinguishes between growth and development perspectives in evaluating the impact of migration. The former pertains to a rise in productivity, taking into consideration a host of factors such as employment generation, skills transfer, wage levels, foreign exchange earnings, personal income and savings. Despite substantial positive economic contribution, these were not maximized. Furthermore he makes the case that this should only provide temporary relief to the economy, rather than instigate dependence. Similarly, while remittances played a role in keeping the Philippine economy afloat during the Asian Financial Crisis in the 1990s, such reliance also indicates the failure of the country's development state (Camroux, 2008). It then raises the interesting paradox of migration as being both the manifestation of Philippine underdevelopment, as well as its salvation.

The development perspective of evaluating migration concerns the expanded access to wealth and basic social services (Vasquez, 1992). In this sense migration has extended non-economic gains like education and social security to a considerably wider group of

people. However this exists within the limits of the private realm of the family, rather than actual structural change in education access for the general public. Civil society efforts in addressing education, employment, welfare and other social concerns signal existing structural problems that the state has overlooked in spite of migration's economic benefits. State reliance on migration goes beyond the economic realm and has social repercussions (Camroux, 2008). Social institutions in the country are compromised as well (Vasquez, 1992). The irony lies in the rationale of having to leave "for the family" while bringing with it its own trade-offs (Opiniano & Castro 2006). Separation of family members has implications on family bonds. Shifting parental and spousal roles also affect family dynamics. Such an arrangement also compromises children's welfare having to grow up without the physical support and guidance of their parents. Circumstances may also force them to take on adult roles. At the community level, migration influences social stratification, leadership structure and social values.

Non-economic trade-offs also manifest in the realities that challenge migrant welfare abroad. The 1995 execution of the Filipina domestic worker Flor Contemplacion in Singapore painted the human face to what has otherwise been widely regarded as a purely economic matter. Public outcry following this execution challenged state policy on labour export (Camroux, 2008). It also underscores the role that state responsibility has over Overseas Filipino Workers (OFWs). Harsh working conditions, which may include abuse and discrimination, are among those that the migrant worker has to endure (de Guzman, 1993). Challenges in accessing social welfare institutions and support among Filipino domestic workers in Italy have also been documented (Vasquez, 1992). However the compatriot mentality of "who else would help each other but ourselves?" provides was captured on an ethnographic study focusing on Filipino migrant workers Saudi Arabia (de Guzman, 1993). The study showed the group's ability to organize itself, as well as recognize and articulate their class interests and bargaining power. Filipino migrant groups' potential to be agents for social change was also exhibited at the national level in the 1980s. The Filipino diaspora saw its "high point of political activism" by putting pressure on the United States government, thereby contributing to the installment of Corazon Aquino (Camroux, 2008).

These highlight the regard that migrant communities hold for meaningful change, which transcend their economic role. The diasporic Filipino identity overlooks differences in migrants’ personal circumstances, connecting various Filipino communities across the globe (Tyner, 2009). However there exists an argument of the state’s role in “manufacturing” loyal sentiments among its diaspora (Piper, 2009). It can be manifested through policy or rhetoric, bringing to mind the idea of overseas Filipinos as “Bagong Bayani” (New Heroes) in the Philippines (Zarate, 2008). Regardless, the Filipino’s ability to maintain ties to their home country despite the physical distance has been remarked in contrast to others’ (Camroux, 2008).

Recognizing this, efforts to maximize and integrate the diaspora into the mainstream Philippine society have been undertaken by the government (Opiniano & Castro, 2006). Policies such as the Overseas Absentee Voting Act of 2003 (RA 9189) and Citizenship Retention and Reacquisition Act of 2003 are also in place. Presidential trips overseas have also seen engagement with local Filipino communities as stakeholders (Camroux 2008). Further building on this is a recent CFO initiative, Diaspora to Development Programme (D2D). D2D builds on the Lingkod sa Kapwa Pilipino program established in 1989, which has channeled 2-billion-pesos worth of development assistance from Filipinos overseas. Having recognised the diaspora’s potential as development actors in a globalising world, it aims to provide overseas Filipinos with the necessary information, services, incentives and network to engage in Philippine development (CFO, 2013). Within the umbrella programme are projects aimed at various aspects of home country development:

Business Advisory Circle	Return and Reintegration
Arts and Cultural Exchange	Tourism Initiatives
Diaspora Philanthropy	Diaspora Investment
Global Legal Assistance Program	Medical Missions
Alay Dunong Program (Knowledge Transfer)	Balik-Turo (Teach-Share)/Educational Exchange

It is through its migrant workers that the Philippines contributes to global development most significantly. Social relations throughout the world economy are changed through its labor market efforts (Tyner, 2009). This reality poses the question of the meaning that it holds as well as the dynamics at play between migrants and their host countries. Adaptation is influenced by incentives and opportunities for settling that the host country offers (Vasquez, 1992). Thus, the following section will discuss South Africa as a receiving country.

### **2.2.3 Migration and South Africa as a receiving country**

With the increase in its international economic and political significance, South Africa sees itself host to migrants of various kinds, from an estimated 100 countries (Adepoju, 2003). The Immigration Act of 2002 provides the main policy framework for migration in South Africa. It distinguishes between the foreigners who decide to settle in the country, manifested in the different legal status granted to foreigners: asylum seekers, refugees, work permit, special skills permit, study permit, volunteer permit.

The phenomenon of migrants moving to higher-income non-Western countries is fueled by labour demands in these economies (Piper, 2009). Post-apartheid South Africa in particular saw the emigration of people who felt disadvantaged from the new administration's policies (Adepoju 2003). This mass emigration, coupled by a majority that was historically deprived in training, necessitated the inflow of skilled migrant. Increased conflict in neighboring African countries also prompted an influx of migrant refugees (UNHCR, 2011a). However the newly-democratised South Africa saw itself unprepared for such mass immigration, both in policy and public perception (Crush 2000). These shape the backdrop for modern-day South Africa as a receiving country.

As with other host countries—mostly in the developed world—South Africa employs a conservative approach to immigration. This is especially given the prevalence of high unemployment, inequality and poverty in the country (Adepoju, 2003). Objectively, this highlights issues of distribution and access to resources in the country. Subjectively, it

fuels the perception that migrants do not only serve as competitors, but also a drain to resources, while being a source of diseases (Adepoju, 2003; Khan, 2007; Govender, 2009). Mattes et al., (in Crush 2000) notes this belief for over sixty percent of South Africans in 1999. This is manifested at the policy level through control mechanisms such as: heightened focus on border controls, permits, detention and use of security forces (Crush, 2000; Vigneswaran, 2009).

Yet alongside these exclusionary practices is a policy that favours those who can contribute to economic development in the country. The Immigration Act of 2002 welcomes skilled workers, expatriates, investors and pensioners (Khan, 2007). This reinforces the “two gate immigration system” of a country, which has the market for professional skills in education and healthcare (Vigneswaran, 2009). As such there is difficulty in reconciling the mixed messages given to migrants. Existing discrepancies and gaps in its implementation reveal the longstanding need for a coherent approach to migration policy (Khan, 2007; Govender, 2009). Limited state capacity is cited as a cause such disconnect, alongside the lack of public information and existing public perception tainted by xenophobia (Khan, 2007). Clearly determining the initial direction of causal factors between such state instruments and the social realities of Xenophobia in South Africa is a significant but challenging discussion worthy of its own discourse. What is relevant to note is that these are mutually reinforcing realities that co-exist in this current context. Nonetheless there is a need for coherent policy especially given the diverse profile of migrants that the country attracts. Racial and class bias persist in categorizing migrants in the country (Vigneswaran, 2009).

These conflicting realities that characterize migration in South Africa provide an interesting point of investigation regarding the space that Filipinos occupy in this context. After all state policy on capital-migrant labor relation plays a key role in defining the conditions that shape migrant experience (Gibson and Graham, 2002). It is of particular relevance given the reality that two decades after the end of Apartheid, South Africa still remains a divided nation (National Planning Commission, 2011). Migration is a demographic factor that has implications for the country’s social cohesion.

These raise questions on the current administration's ability to "unify such a divided and polarized society" as reflected in the "nationalisms ... constructed through a process of ethnic antagonism ... [and] new generalized antagonism toward migrant workers" (Munck, 2005:104). Thus the study aims to offer a new perspective that could abate this.

## **2.3 SOUTH-SOUTH COOPERATION:** **THE PHILIPPINES AND SOUTH AFRICA**

Reshaping migrant experience towards agency necessitates a discussion of opportunities available in the environment where development is to take place. The following section gives an overview of the potentials that lie in development cooperation between South Africa and the Philippines. This is done through a discussion of their parallel political, economic, and social realities that serve as a basis for cooperation; as well as existing initiatives upon which the former could be maximized.

### **2.3.1 Contextual parallelisms**

Rationale supporting this pursuit takes the form of existing similarities and complementarities between the countries' political, economic, and social experience. After all, among the key principles of South-South Cooperation, is solidarity arising from shared experiences. It is also from this view that South Africa is launching its own South African Development Partnership Agency (SADPA), which provides great opportunity for the country to work with other African and developing countries for international cooperation (Department of International Relations and Cooperation, 2011).

- **Political history**

Politically, both have gone through various democratization processes. The first stems from their colonial history. This initially meant freedom from colonial rule, which eventually translated to freedom from unjust/oppressive institutions that thrived in new found autonomous, but vulnerable political landscapes. Nevertheless both were involved in the third wave of democratisation in the late 19th century, paving for the democratic transition phase that they both face (Huntington, 1991).

Practice of democratic principles is yet to be fully realised and ills challenging it are yet to be fully addressed. Impediments to democracy and development such as corruption, cronyism, poor service delivery and electoral practices, among others, still plague both countries. Social unionism was also employed in both countries where alternative movements are concerned (Aganon, Serrano & Certeza, 2009).

- Economic profile

Both countries' economies are also considered as transitioning. The performance exhibited by each economy in recent years has prompted them titles such as "emerging economies" and "Newly Industrialised Countries". Both countries appear in various indices that reflect this status. At each country's disposal are similar resource base as well. Each is shaped by its respective diverse natural environment characterised by coasts, mountains, and plains, as well as tropical to sub-tropical conditions. Industries such as agriculture, marine, mining and tourism are among key similarities. Both are also characterised by human capital gauged by the HDI. The countries rank Medium in its socio-economic indicators, with 0.644 for the Philippines and South Africa at 0.619 (UNDP, 2011a). In some ways this ranking reflects the dynamics between economic and political issues, such as how poor service delivery hinders the effect of GDP growth, among others. Nonetheless each workforce is empowered by a degree of English proficiency that enhances its global competitiveness.

- Social diversity

Social diversity is reflected in both societies. Each has a number of local ethnic groups that were territorially united by colonial powers, who further contributed to the diversity on their own, alongside other migrant groups that settled even before the independence of these republics. This diversity exhibits itself through the different native languages and cultures present in each country. The Western Cape in itself is home to some Filipino descendants, whose ancestors helped establish the fishing industry in Kalk Bay back in the 1840s (Walker, 2002).

Despite such heterogeneity (or perhaps, due to it), native values for each country such as Philippines' *Bayanihan* and *kapwa*, as well as South Africa's *Ubuntu* espouse principles that promote the spirit of solidarity (Asian Development Bank, 2007; Murithi, 2006).

### 2.3.2 Existing initiatives

There have been various efforts in fostering cooperation between the two countries. Manifestations of these links are present in political, economic, as well as social spheres.

- Political

As signatory members to the United Nations, both countries participate in multilateral negotiating blocs within the system, which cater to a variety of international issues. Both countries are members of the Group of 77 and China, which advocates developing country interests through its presence in different United Nations headquarters concerned with food, environment, cultural, and industrial issues. Both are also part of the Group of 24, which cater to international monetary and development matters in international financial institutions. Finally, the role that agriculture plays in each one's respective economy has seen their membership for overlapping groupings in the World Trade Organization (Keet, 2006). Efforts at the regional level are also in place, where a New Asian-African Strategic Partnership is in the process of establishment (Pretoria PE, 2011).

Diplomatic relations between the two countries has been established since 1994, which paved opportunities for exploring cooperation ranging from security, economic, technical and scientific interests. Currently there is a Philippine Embassy in Pretoria, Honorary Philippine Consulate in Cape Town while Manila holds the South African Embassy. There are also efforts to cooperate beyond the administrative branch of the government. These extend to other domestic concerns such as security and intelligence, as well as the judiciary. A memorandum of agreement on *Judicial Cooperation between the Philippine Supreme Court and the Constitutional Court of South Africa* has been signed in 2009.

- Economic

Most bilateral agreements signed between the two countries relate to economic cooperation. The year 1997 saw the establishment of a trade agreement between both countries, which came into full effect in 2002, followed by the establishment of the Philippine-South African Business Council in 2004. It has been key in facilitating Philippines-South Africa business consultation workshops, which serve as the venue for exploring mutual business opportunities for both countries, and networking with guests from the private sector, industry associations and government.

Areas of cooperation include rail & port, arms & ammunition, garments, food, coal, events management & services, telecommunications, and privatization of the energy sector. As of 2011, the Philippine Central Bank cites sixteen Philippine firms that cater to the South African market (BSP, 2011:107). The Philippine metropolis Cebu's furniture industry has been successful in the South African market. In turn, tourism and food products have been marketed to the Filipino public through the South Africa Food & Wine Festival . Technical cooperation on the national scale has also taken form with Filipinos providing expertise in developing South Africa's business process outsourcing industry. Recent infrastructure developments in South Africa also saw the arrival of professionals from the Philippines. Cape Town saw Filipino engineers working on the World Cup infrastructures, in addition to some 200 engineers for the Gautrain project (Vigno, personal interview, 2012 April 25). New data also reveals a 15% increase of trade between the two countries, with 2011 figures at \$239,888,632 (Department of Trade and Industry, 2011).

- Social

Relations are being established between non-governmental organizations in the countries. Associations such as the Third World Network serve as a platform for these grassroots organisations to come forward on issues such as trade (Third World Network, 2002). The migrant community presents a potential that can be further explored in order to enhance social cooperation between the two countries.

## **2.4 CONCLUSION**

This chapter presented a review of existing literature relevant to the study. It discussed relevant migration frameworks, approaches and context. The basis for increased cooperation between South Africa and the Philippines was also presented through a comparative overview of their political, economic and social context. Existing initiatives were also discussed. The following chapter presents the research methodology.

University of Cape Town

## **III. METHODOLOGY**

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### **3. INTRODUCTION**

The following chapter introduces the reader to the research design; population and sampling; data collection approach; data analysis, data verification and limitations of the study.

### **3.1 RESEARCH DESIGN**

An exploratory qualitative approach has been undertaken given the nature of the study. It is deemed appropriate given its focus on the subjective meanings and interpretations that the Filipino migrant community gave to their experiences, in alignment with the research objectives. De Vos et al. (2011) note the value of such an approach in deepening one's understanding of a phenomenon that has not been fully researched before. The aim of such exploratory studies is to develop an understanding of human behaviour and complex phenomena through description rather than an explanation. Qualitative designs support such a study, as it "elicits participant accounts of meaning, experience or perceptions" (McRoy in De Vos et al., 2011:65). Thus the capturing of such information is very pertinent to the study.

### **3.2 POPULATION AND SAMPLING**

The population targeted was the migrant settler community in the Western Cape consisting of about 200 settler families as estimated by the Philippine representation (Vigno, personal interview, 2012 April 25). In accessing the target sample group of respondents, the researcher employed a purposive sampling method. This approach is deemed appropriate for exploring features or processes associated with a particular subject (De Vos et al., 2011). In such a case, the researcher purposefully chooses participants who are in a position to provide rich information on the topic on being explored. A set of criteria is established so as to properly select typical cases that represent elements, allowing for "rich detail to maximize the range of specific information that can be obtained from and about that context" (De Vos et al., 2011:393).

Two subsets of samples were considered. These respondents were purposively selected based on the following criteria:

- Fourteen Filipino migrant household representatives
  - Lived in South Africa for at least 5 years
  - Household representative was born with a Filipino citizenship
  - Legal status, regardless of current citizenship held
  - Resides in the Western Cape
  - All fourteen were interviewed individually and four were part of a focus group discussion.
- Four Key Informants
  - Three community leaders
    - Two from Filipino Social Club of Cape Town
    - One from Kababayan Filipino Social Club of Cape Town
  - One Representative of the Philippine state (Honorary Philippine Consulate)

### **3.3 DATA COLLECTION STRATEGY**

Permission to gain entry into the community was sought through the Honorary Philippine Consulate in Cape Town. The researcher was then referred to Filipino contacts in the area. Upon initial contact, community leaders and members were informed of the researcher's background and intentions. Permission for data collection was solicited further through a formal letter addressed to the key informants. This includes a background on the study as well as its objectives (see Appendix A:88). Community leaders were asked for permission to interview members of their respective communities. Questionnaires developed for the household sample were also supplied to the appropriate community leaders and honorary consul, prior to the respective interviews.

Opportunities that community gatherings presented were also seized. The researcher's interaction with members helped her identify household representatives that fit her criteria. Community leaders extended assistance in identifying suitable respondents, as well as the respondents themselves.

### **3.4 DATA COLLECTION APPROACH**

- **In-depth face-to-face interviewing**

In-depth face-to-face interviews were conducted as well as one Focus Group discussion. These were deemed as the appropriate methods that would elicit the necessary information in this research. According to De Vos (1998), face-to-face in-depth interviewing is a setting whereby it is possible to probe the respondent for further clarification. It is an approach that allows flexibility to ask questions for purposes of follow up, clarification and probing (Langford & McDonagh, 2003). The face-to-face nature of the approach also allows insights on non-verbal cues, which enhances people-centered research. The first phase was composed of interviews with four key informants. Following this, fourteen household representatives (seven from each Filipino community group) were interviewed individually. Of these, four were then identified and invited for a group interview session.

- **Focus Group Discussion**

A Focus Group Discussion (FGD) is a facilitated discussion “designed to obtain the perceptions of the group on a defined area of interest” (Langford & McDonagh, 2003:2). In this respect, the aim is to explore their thoughts, insights, and feelings regarding their role as development agents. Their participation is based on the relevance of their characteristics to the topic (De Vos, 2002; Langford & McDonagh, 2003), especially in relation to their specific initiative and availability. FGD’s synergistic nature provides deeper insights on human behavior and motivation (De Vos, 2002; Langford & McDonagh, 2003). It allows one to gauge their group dynamics, valuable for discerning their capacity to implement development initiative collectively.

The small number of participants allowed for deeper insights prompted by a less intimidating atmosphere with sufficient time for each person to participate. Its interactive nature also makes for a more enterprising discussion on their contributions, challenges and potential. The exchange of ideas prompts richer responses where an individual, isolated approach would be limiting.

FGD is also useful in understanding “differences between groups” (Krueger and Casey 2000 in De Vos, 2002: 307). By conducting a session comprised of members from both Filipino community groups, as well as those that associate with neither and both, the researcher is able to contrast different perspectives, while uncovering points of convergence. Furthermore, the approach is appropriate for the following purposes, which are in line with the research objectives (Greenbaum, 1998):

- Establishing habits, experiences, of the particular group—in relation to their profile and contribution
- Assessment of needs, services of the particular group—in relation to the available support systems for them
- Brainstorming—in relation to how they could contribute to increased Philippine-South African relations

### **3.5 DATA COLLECTION INSTRUMENTS**

Four sets of semi-structured interview schedules were developed and used to guide the data collection process:

1. Face-to-face interview schedule for the Filipino household heads  
(Appendix B:89-92)
2. Face-to-face interview schedule for the Filipino community leaders  
(Appendix C:93-95)
3. Face-to-face interview schedule for the Honorary Consulate  
(Appendix D:96-97)
4. Semi-structured Focus Group Interview Guide for a group of Filipino household heads (Appendix E:98-99)

Semi-structured interview schedules ensure that all the necessary information can be elicited in a semi-structured manner allowing for probing and not necessarily sticking to the sequencing of questioning in a rigid manner. Such schedules are intended to guide rather than dictate the flow of discussion (De Vos, 1998). Individual interviews were conducted with members that associated with each faction of the Filipino community: Filipino Social Club of Cape Town and *Kababayan* Filipino Social Club of Cape Town.

These aim at personal details regarding their migrant experience, as well as indicators of their household's socio-economic contributions.

### **3.6 DATA ANALYSIS PROCESS**

Data has been analysed using an adaptation of Tesch (1990) in De Vos (1998). The following steps have been undertaken in doing so:

1. Read through all the transcriptions.
2. Comprehend interviews in relation to the objectives of the research. These objectives form part of the main themes.
3. Annotate the margins with labels that capture what the respondents are saying, in trying to understand the meanings that they gave to their experiences.
4. Colour code labels according to various categories that belong to the same theme.
5. Repeat the process and re-label categories should the need arise after careful review of themes and categories.
6. Ascertain whether these categories are mutually exclusive and make sense in relation to each other and to the larger themes.
7. Design a table (framework) representing these main themes and appropriate categories, even sub-categories if necessary.
8. Use this framework to guide logical sequencing of the discussion of findings.
9. Use the actual verbatim quotes to illustrate thematic points and link relevant literature to the discussion.
10. Compare and contrast the work done by other authors in the field of study with these findings.

### **3.7 DATA VERIFICATION**

Lincoln & Guba (1985) as cited in De Vos (2002) pertain to credibility, transferability, dependability and confirmability as the four criteria in upholding the legitimacy and neutrality of a study's findings.

- **Credibility**

Credibility refers to the “compatibility between the constructed realities that exist in the minds of the respondents and those that are attributed to them” (Lincoln & Guba in Babbie & Mouton, 2001:277). The following practices are steps in attaining this: prolonged engagement, persistent observation, triangulation, referential adequacy, peer debriefing and member checks.

The time allotted to interaction with respondents sought to fulfill the first two. Individual interviews ran from 38 minutes to as long as two hours, with an average of one hour and six minutes for all seventeen individual interviews. The focus group discussion ran for over two hours. Triangulation was aimed at by employing both individual and group interviews. Employing a focus group discussion sought to affirm findings from the individual interviews. It was also striven for by capturing recurrent themes across the different sampling subsets. Where possible, existing literature and external documents were also used to contrast and confirm findings. However the nature of the study renders little available data that would support these. The number of household heads interviewed is also only a fraction of the estimated total of Filipino settlers in Cape Town. To compensate for this, diversity of respondents within the general purposive sampling criteria was actively sought from both subsets of the key informants and household heads (e.g.: age, years of residence, occupation, group affiliation).

A Macintosh computer programme called “Garage Band” was used to record the interviews. These were then transcribed and constantly checked during the study. Finally, debriefing took place between the researcher and her thesis supervisor.

- **Transferability**

This aspect pertains to the applicability of the findings to other contexts or respondents (Babbie & Mouton, 2001). It can be achieved through thick description and purposive sampling, which is an approach the study applied as detailed above.

- **Dependability**

Dependability pertains to the extent to which the study could elicit similar findings when applied to a different context. Thus the approaches used to ensure credibility are employed to achieve dependability as well (Babbie & Mouton, 2001). Strategies for credibility were employed as outlined above in lieu of an external inquiry audit.

- **Confirmability**

This refers to “the degree to which the findings are the product of the focus of the inquiry and not of the biases of the researcher” (Babbie & Mouton, 2001:278). It can be attained through a confirmability audit trial. In attaining this, the researcher is making all relevant notes and marked transcriptions available through her supervisor.

### **3.8 LIMITATIONS**

Below are realities that could inhibit the project’s full potential. Acknowledging these realities allow them to be addressed and compensated for accordingly.

- **Research design**

The study’s qualitative approach is limiting where a precise numerical account of economic contributions is desired. Thus it is important to take note of the study’s main exploratory goal. Conversely, triangulation through the use of different methods and sources was used to minimize room for biases.

- **Data sampling**

The purposive sampling approach used could raise issues where generalization is concerned. As such the researcher took extra care in balancing household representatives that fit the criteria, while ensuring diversity of her sampling where possible.

- **Data collection**

Time is a major constraint in the implementation of data collection, in terms of actual interviews as well as existing literature that can support the study. Although countless revisions and improvement of the design, methodology and data collection can be employed for better quality, time constraints restrict opportunities for this. It can also be anticipated that although the interview language was in English, it is not the native language for many of the interviewees, which could limit the expression of their thoughts.

As a student, the researcher is not free from error and regards the research as a learning process in itself. This pertains to both the content as well as technical aspects of the study. Furthermore the researcher is not above the challenges that scholars in this area have been faced with, such as the dearth of available empirical data, particularly with respect to south-south migration (Bakewell, 2009b; Melde, 2011; Ratha & Shaw, 2007). This lack of information does little to ease the challenge of approaching the broad nature of the topic and its concepts (Bakewell, 2009b).

Regardless, the hope is that the study can somehow contribute to some of these gaps through its choice of interdisciplinary approach towards the subject focus.

### **3.9 CONCLUSION**

This chapter detailed the research strategy undertaken by the study. The following chapter presents and analyses the findings that resulted from this research.

## IV. PRESENTATION AND DISCUSSION OF FINDINGS

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### **4. INTRODUCTION**

This chapter presents a profile of the sample groups; the table of framework for discussing the findings; and a discussion of these findings based on the logical sequence outlined in the table. By linking these to the literature previously discussed in Chapter Two, a critical commentary of the findings is developed .

### **4.1 RESPONDENT PROFILES**

Below is the profile of key informants; the fourteen Filipino household representatives interviewed according to the sampling criteria; and participants of the Focus Group discussion.

**Table 1: Profile of Key Informants interviewed**

<b>COMMUNITY LEADERS</b>	<b>Representation</b>
Community Leader A	Filipino Community A
Community Officer A	Filipino Community A
Community Leader B	Filipino Community B
Philippine State Representative	Honorary Philippine Consulate – Cape Town

Four key informants were interviewed, with one representing the Philippine government, two representing one Filipino community group, and another representing another Filipino community group.

**Table 2: Profile of Household Heads in Focus Group**

<b>HOUSEHOLD HEADS</b>	<b>Group Interaction</b>
Alma	Filipino Community A
Amalia	Filipino Community B
Gabriela	Both
Tina	Neither

**Table 3: Profile of Household Heads interviewed individually**

Alias	Western Cape Suburb	Year of Arrival in South Africa (*)	South African Legal Status
Jessica	Tamboerskloof	2006 (6)	Temporary Permanent Residence
Charice	Diep River	1995 (17)	Citizen
Alma	Bonteheuwel	1987 (24+)	Citizen
Gabriella	Athlone	2006 (5+)	Work Permit
Maricel	Durbanville	1999 (13)	Citizen
Amalia	Milnerton	1991 (21)	Citizen
Tina	Pinelands	2003 (9)	Permanent Resident
Dolphy	Fish Hoek	1984 (28)	Citizen
Carmina	Wynberg	2005 (7)	Permanent Resident
Kris	Durbanville	2007 (5)	Temporary Permanent Residence
Sisa	Camps Bay	2005 (7)	Work Permit
Juan	Killarney Gardens	2004 (8)	Permanent Resident
Lorna	Malmesbury	2000 (12)	Temporary Permanent Residence
Kim	Blouberg Sands	1994 (18)	Citizen

*\*Number of years residing in South Africa*

These note variables for assessing the impact of various social processes on the workers, their families and communities: length of stay overseas, prevailing culture in the receiving country and possibilities of permanent residency/citizenship (Vasquez, 1992).

Among the respondents, half (7) have been residing in South Africa for 5-10 years, while the other half have more than ten years of residence. Five have acquired South African citizenship, three Permanent Residence, three Temporary Permanent Residence and two on Work Permit. Twelve out of fourteen respondents still have their Filipino passport. These data were gathered in an effort to gauge the respondents' rootedness in both their host and home countries. Diversity was attained in these characteristics. Further details and how these factors impact on migrant experience will be discussed subsequently.

## **4.2 FRAMEWORK FOR DISCUSSION OF FINDINGS**

The following framework was developed after an initial analysis:

<b>Theme 1: Filipinos in Cape Town as a migrant group (Profile)</b>	<b>1. Filipinos in Cape Town as a migrant group</b> <ul style="list-style-type: none"> <li>• Origin in the Philippines</li> <li>• Training and industry</li> <li>• Motives for migration</li> </ul>
<b>Theme 2: Migrant experience in South Africa</b>	<b>2. Migrant experiences in South Africa</b> <p><b>2.1 Philippines:</b> Reactions to South African immigration</p> <p><b>2.2 South Africa:</b> Adaptation</p> <ul style="list-style-type: none"> <li>• Filipino identity</li> <li>• Personal welfare and lifestyle</li> <li>• The multicultural context</li> </ul>
<b>Theme 3: Socio-economic contributions to South Africa</b>	<b>3. Socio-economic contributions to South Africa</b> <p><b>3.1 Economic contributions</b></p> <ul style="list-style-type: none"> <li>• Financial: Consumption, taxation and investments</li> <li>• Entrepreneurial: Services and employment</li> </ul> <p><b>3.2 Social contributions</b></p> <ul style="list-style-type: none"> <li>• Skills exchange</li> <li>• Community initiatives</li> </ul>
<b>Theme 4: Socio-economic contributions to the Philippines</b>	<b>4. Socio-economic contributions to the Philippines</b> <p><b>4.1 Economic contributions</b></p> <ul style="list-style-type: none"> <li>• Trade/investments</li> <li>• Remittances</li> </ul> <p><b>4.2 Social contributions</b></p> <ul style="list-style-type: none"> <li>• Community initiatives</li> <li>• Transnational network</li> </ul>
<b>Theme 5: Improving Philippine-South African relations</b>	<b>5. Improving Philippine-South Africa relations</b> <p><b>5.1 Challenges to maximizing the diaspora's potential</b></p> <ul style="list-style-type: none"> <li>• Issues of conflict and cohesion in the Filipino community</li> <li>• Limited Philippine government presence</li> <li>• Dependency and sustainability</li> </ul> <p><b>5.2 Potential areas for cooperation</b></p> <ul style="list-style-type: none"> <li>• Multilateral trade network/Industries</li> <li>• Development issues</li> <li>• Values and culture</li> </ul>

### **4.3 PRESENTATION OF FINDINGS**

This section presents the research findings according to the framework above.

#### **4.3.1 Filipinos in Cape Town as a migrant group**

<b>Origin in the Philippines (City)</b>	<b>Reason for Settling</b>	<b>Educational Attainment</b>	<b>Industry</b>
Region VIII (Ormoc)	Partner (Resident)	Some Tertiary	Business Management
NCR** (Mandaluyong)	Work (Family)	Post-secondary training	Garment
Region VI (Roxas)	Work (Employer)	Tertiary	Civil Engineering
Region VI (Bacolod)	Volunteer	Tertiary	Social Work
Region VI (Panay)	Work (Employer)	Post-secondary training	Computer
Region III (Bataan)	Partner (Work)	Tertiary	Chemical Engineering
NCR (Paranaque)	Partner (Citizen)	Tertiary	Economics
NCR (Marikina)	Work (Employer)	Some Tertiary	Industrial Engineering (Technicon)
Region III (Bataan)	Partner (Citizen)	Tertiary	Accountancy
Region VII (Bohol)	Partner (Citizen)	Tertiary	Computer Science
Region IV (Batangas)	Work (Employer)	Tertiary	Banking and Finance
NCR (Ortigas)	Business	Tertiary	Building Contractor
Region VIII (Leyte)	Work (Employer)	Tertiary	Nursing
NCR (Mandaluyong)	Partner (Work)	Post-secondary training	Clerical

*Table 5: Filipino migrant group profile*

- **Origin in the Philippines**

The respondents come from various parts of the Philippines, as reflected in the different administrative regions in the country. Five are from the \*\*National Capital Region (NCR), three from Eastern Visayas Region (Region VI), two from Central Luzon Region (Region III), two from Western Visayas Region (Region VIII), one from from Southern Luzon Region (Region IV) and another one from Central Visayas Region (VII). This reflects a certain amount of diversity unlike most transplanted migrant communities. Likewise their residences in South Africa are located in a number of suburbs, which has implications for their social organisation. Eight respondents lived in Cape Town while six first settled in the Eastern Cape.

- Training and industry

All of the respondents finished their secondary schooling, with a vast majority finishing tertiary education. Two had some tertiary education and another two took on post-secondary school training. Regardless, all have been legally employed in both countries. Nine of the respondents are in the same industry that they were in, back in the Philippines, utilizing skills consistent with their training. The others have pursued different tracks, with one specifically facing hindrances in converting her professional qualification. Industries that the respondents are involved with include administrative, care, development, entrepreneurial, managerial and manufacturing, making for a diverse skills set present in the group. Thus the level of skills and training that this particular group had shows the extent to which they are empowered. Their education level and employment are a manifestation of this given the national context of their host and home countries. Unemployment rate is at 25.5% (STATS SA, 2012) and 29.4% (Ordinario, 2012) respectively. A 2004 UNESCO study reveals 51% of Filipinos aged 25-64 completed secondary schooling, and 27% have tertiary (Virola, 2007). Only 4.3% of South Africans between 25-64 completed tertiary education (OECD, 2011).

The disparity between the two countries is also mostly limited to economic performance. After all, a high unemployment rate in South Africa means a highly competitive labor market with subsequently low salaries. At roughly 4.5 PHP to 1 ZAR, financial benefits are limited in comparison to that of other foreign currencies. A cost-benefit analysis for Filipinos to travel all the way to South Africa for menial jobs would not render benefits relative to developed countries. Offering an even smaller wage for their services than locals would also be to a greater disadvantage if one considers the initial cost of airfare. Traveling to South Africa from the Philippines is not as affordable as it would be for neighboring African countries to South Africa, nor is it for Filipinos to neighboring Southeast Asian countries. Thus it is worth considering what motives and incentives shape Filipino migration to South Africa.

- Motives for migration

Respondents' motives for settling in South Africa represent a balanced mix of economic and non-economic factors. Six of the respondents came for work, six to join their partners (three South African citizens, one resident, three Filipinos coming here to work), one as an investor, and one as a volunteer. Some exhibit an overlap of personal/professional reasons (e.g.: meeting their partner during employment in South Africa; or going to South Africa due to their partner's employment). Their responses reflect this:

*"I came here as a visitor, and after three months my employer processed and converted it into a work permit for 3 years ... I just [came] because my friends... were here so I just wanted to join my friends" – Alma*

*"...the situation in Manila [didn't] allow me to carry on with my business. That's why I came to South Africa. First of all it is a developing economy ... And in that situation there is a lot of opportunity ... that's from a business point of view, and also from a point of view that I don't know anybody here. So that makes things a lot easier for me in that sense of being able to ... start from scratch again." – Juan*

*"I worked for the company for a year and a half because I was traveling from Bangkok and South Africa, 3 months or 2 months at a time. But then when I was working here in South Africa, I met my husband ... and then we decided 'cause the company was gonna send me to Turkey in 2005 and I was already married at the time so I decided to resign and I moved to South Africa permanently" – Carmina*

*"... it is a professional volunteering agency, skilled so I applied to that post and then they offered me 8 countries. First country, I don't like so I said "no give me another" until last is South Africa ... as a volunteer so we don't receive salary, but they give us, they call it a decent allowance. That allowance if you compare it to the Philippine salaries, comparable ... so it's fine." – Gabriela*

*"... it was my husband first who went to South Africa ... he was [an] Industrial Engineer and was invited to handle a factory ... he told us that we can come with him because the place is okay and then we can survive here" – Amalia*

It is then worth investigating how their empowered status and motives impact on their migrant experience in South Africa.

### 4.3.2 Migrant experience in South Africa

Key to the migrants' transnational advantage is the ability to mediate between two cultures, drawing from insights derived from their experiences in both countries. This is in keeping with how "influences of the external world upon man express themselves in his brain are reflected therein as feelings, thoughts, instincts, volitions" (Engels in de Guzman, 1993:5). Although the first Filipinos settled in South Africa in the 19<sup>th</sup> century, there was an information gap in the two countries' historical relations. Measures imposed during the Apartheid regime isolated South Africa from the international community. The Philippine government in particular banned travels to South Africa. In turn, what feeds into this information gap is a pervading international stigma that both have as "developing countries".

In unpacking this, a discussion of how migrants handle perceptions in both countries will ensue. It will look at how migrants deal with Filipinos' reactions to their immigration to South Africa. Building on this is a discussion of how they express their Filipino identity in South Africa in the way they represent the Philippines. This also forms part of the bigger discourse on their experience settling in the Rainbow Nation. After all it is this experience that also shapes their capacity to be agents of development for both countries.

#### 4.3.2.1 Philippines: Reactions to South African immigration

In a country with only 1.7% of overseas nationals in Africa (National Statistics Office, 2011), Filipino perception of Africa is limited. This is reflected in the way people in the Philippines reacted to the idea of migrating to South Africa, as exemplified by the following quotes:

*"They think I was weird... I think it's because it's so far? Funny thing is when I told my mum I'm going to South Africa and she said "Oh my gosh you'll be living in the bush! With the lions and the animals..." And I think before I came here a lot of the things that people in the Philippines know about South Africa were the wildlife... Very little for instance know about how normal South Africans live and they have very little idea or picture in their mind how well-paved the roads here are. They think that the roads are dirt roads, you know, very much National Geographic kind of thing. But South Africa is not, and admittedly, it's not the top destination if you're migrating from the Philippines... normally it's the States, Australia, UK, Canada" – Tina*

*“...when my family came to know that we were moving with my husband to South Africa, they told us that “What are you going to do in South Africa?! People are eating people there!” They were all thinking that this is a wild place... You know things that they saw in the movies. And that’s what I was seeing in the movie also ... the movie that I saw there is Gods Must Be Crazy and then we were laughing at that and people think that South Africa is just like that.” – Amalia*

*“...I don’t know if it is our mindset that if someone say South Africa, they’re thinking about the bush and the monkeys and that’s what I’m thinking about when I came here... I can only see land, like a big piece of land, the trees ... And the first impression that I had before when I came I said “Where are the people?” because in our country you know it’s so, we have a big population in Philippines fine, so everywhere you go there’s people. And it’s so surprisingly when I came there’s no one, there’s only few people in the road, it’s quiet” – Kim*

Sharing the same preconceived notions was common among the respondents.

Nonetheless transformation of original impressions occurred:

*“You know what you see in the TV... “Oh my god, all these animals! Okay I go there”. And then when I arrived “Where are they?!?! Where are the animals?!” I was shocked it’s not like that...” – Jessica*

*“I surfed the internet because my impression was jungle and it’s Africa and even my family’s like “Africa! What are you going to do there?!” so I surfed in the internet and I saw when it said Cape Town, boom! What, it looks like Makati... So yeah, cool. Immediately I responded and said ok I’ll go for that.” – Gabriela*

*“Yeah they’re a little bit worried but then afterwards when I arrived then I told them that it’s a nice country so it’s okay with them” – Alma*

*“Actually the first reaction is “What? In South Africa?” they say it’s a jungle there! A jungle in there... so they never think [it] is the best... for me, I think it’s the best country” – Charice*

Two of the respondents had family in Lesotho prior to their move, and these relatives were key in breaking that stereotype for them. Alternatively, some were also guided by the opportunity that they saw:

*“You know my reaction is “okay it’s nice” ... going abroad is making money you know ... But in your mind, in your heart, they can say that if you compare what you earn from the Philippines and what you earn now ... this is a big money there’s a big difference from your salary before. So you can let your kids to go to university” – Lorna*

*“Well that time, in the Philippines, normally when you’re leaving going overseas they’re very happy because ... getting some you know, US dollars which normally they think ... you know, send money in the Philippines. And that’s it, they’re very happy, and they very much would like to come here too.” – Dolphy*

*“First of all it is a developing economy. Second of all, South Africa ... became a democratic country only 1994. And in that situation there is a lot of opportunity. More specifically for someone like me, you know when I was trying to make up my mind, which country, where do I go to, I came to South Africa first and saw a lot of opportunity. That’s what makes me decide to come here ... that’s from a business point of view, and also from a point of view that I don’t know anybody here. So that makes things a lot easier for me in that sense of being able to sort of like, start from scratch again.” – Juan*

Migrants have begun to break the stereotypes of South Africa by conveying their own experience of it:

*“...they’re thinking about the bush and all that ... ‘No, you can see, Google it. South Africa’s a very beautiful country especially where we are in Cape Town. It’s the Mother City, you can see, beautiful.” – Kim*

*“...you have to explain to them you know it’s like it’s not just African people there. It’s just not colour or whatever, it’s different people, different race. Same in the Philippines we have Chinese people, we have Indian people as well” – Kris*

*“...when I first came here I was told you have to be very vigilant ... you cannot go here, you cannot go there, especially the girls, you cannot go at night so of course I’m so scared... because in the Philippines it’s Black ... the first impression’s like, you know, bad people, ... but as I go along, I meet them, I mix with them they are actually good... there’s this one day when I went to Pick n Pay carrying all these bags “sisi, sisi, would you like me to help you?” so at first I’m like adamant because what if he just go and run away with my... but you have to give them a benefit of the doubt ... when we reached the place ... I give them 2 rand he was like “no no no no no” so which is, you see just get along, don’t be too hard on them so as you go along be with... like mingle with them, treat them as a person not like other people because they live on the street, but if you really mingle with them, I don’t think they will actually do something wrong. They’re just there also for a living” – Sisa*

These detail respondents’ experiences of migrating to South Africa and how their views of their new society have changed accordingly. It is interesting to note this given how migration has expanded their initial perceptions, shaped by the Philippines' colonial history. Migrants’ experiences of their adjustment build on this.

#### 4.3.2.2 South Africa: Adaptation

The issue of adapting to their new country relates to their Filipino identity in the South African society; their personal welfare and lifestyle; and how these factors shape their place in South Africa. It is meant to gauge their capacity as ‘cosmopolitan citizens’ to mediate between “national traditions, communities of fate and alternative forms of life” (Munck, 2005:118).

- **Filipino identity**

Migrants contributions are underpinned by close ties that migrants maintain with their home countries (Hujo & Piper, 2007). These ties are affirmed through the national identity they manifest when dealing with how locals respond to them:

*“To be honest with you at the moment it is quite difficult because the population of Filipinos in South Africa is relatively small compared to the whole country ... compared to other races like Chinese... We’re still a very small community but I think that’s where the challenge comes because you know we need to make the South Africans aware that we are actually here. That there are Filipinos here, and that we are not Chinese people. We are Filipinos and very different you know!” – Kris*

*“Well in the beginning they thought I’m Chinese. They don’t know about Filipino, they don’t know the difference between Chinese-Japanese-Korean. They just know you’re Asian, you’re Chinese. So when the first apartment that we stayed in here, it’s in Wynberg also and there were kids there and they were all screaming Hello Chinese People, hello!” – Carmina*

*“...someone has greeted me earlier on, South African guy and he asked me “Where you from? Are you from Malaysia?” I said no “Are you from Japan?” I say “No, I’m from Manila, Philippines” and he said “You know, in this country...” it’s like in Philippines, in Philippines when we see people with blonde hair and white face we call it Americans. We normally monopolize it when we see, if we see people with the chunky eyes we say it’s Chinese meanwhile they are not Chinese maybe they are from Hong Kong, Singapore or Malaysia. Same here. When we see us they thought I’m Chinese but I’m not, I’m from the Philippines” – Kim*

*“I have to always explain and emphasize that I am a Filipino. So it so happened that I’m ethnic Chinese but I am a Filipino.” – Juan*

Such display of their Filipino identity complement the idea that Filipinos are able to maintain ties to the Philippines (Camroux, 2008). Some migrants even serve as mini-ambassadors in by promoting and providing information about the country:

*“I must admit that a lot of them here know very little about Philippines, and they couldn’t even pronounce Philippines, they say “PHILI-PAIYNS” and then they start asking questions, like my boss ... I told him that we got 7100 islands, depending if it’s high tide or low tide, and he says like “wow” ... they are all intrigued and he started checking out beaches in the Philippines ... people are wowed by it” – Tina*

*“...some people they don’t know where the Philippines is. ... you have to explain to them you know Southeast Asia ... that’s just how I explain to them and then so those who know they get so interested and then they ask what it’s like there ... so that’s nice then you can relate to them ... The first thing that I tell them is that how beautiful our country is, so obviously we tell them that and how friendly we are and how it’s cheap to travel there!” – Kris*

*“...people say ‘Wow you come from the Philippines. It’s a very nice country’ or ‘Very religious country’ or something like that but some other people, ‘Hey there’s a big problem in the Philippines’ ... they say ‘I watch it on the ... all the foreigners are there, in Mindanao also... kidnapping ... ‘No’ actually I said, ‘no Philippines is a very nice country if you go there one day, you can visit me so maybe at the time there’s a typhoon of course you know because of the month but I’m telling them ‘you must not go around June’ – Charice*

The respondents associate with other Filipinos through the two community groups, albeit in varying degrees. It provides the venue for formal cultural activities as well as informal interaction with fellow compatriots. For some, this has also provided a support system they relate to as “family”.

*“...socially if there’s the Philippine Independence Day, yeah I like it because you don’t have to talk to everybody, just practicing ... get involved with them which is so nice ... we have fun” – Sisa*

*“... we have a good relationship with one another, being a few Filipinos in Cape Town or in South Africa ... They become your relative... They’re the only one who can relate to you, that can help you, in case of trouble” –Dolphy*

- ***Personal welfare and lifestyle***

This section discusses the extent to which they have established a life for themselves and their families in South Africa. Only four of the respondents are without biological family members: two of them reside with their partners, one is a single woman, and another one is a widower. Of the 11 respondents with their spouses, 7 were in double-income partnerships while the other 4 worked with their spouses on joint enterprise. At least seven of the interviewees own some property in South Africa. These are mostly for residential purposes, although some also use their property for supplementary income-generation. Beyond this material security is the migrants’ general life satisfaction, relating to different facets of their settlement:

*“I think, compare my life... Here is a little bit better, I gained more success here” – Maricel*

*“Well the life here in South Africa I must say that it’s good... It’s good for me. ... In the Philippines I must say, that economically, it’s difficult in our country. I worked ... and earned a good salary, but economically still not enough to live a comfortable life... I had my own house in the Philippines and things like that but you know to have your own transport—something like luxury in the Philippines. Here in South Africa it’s a necessity that you can get, you can achieve... Everything is achievable... you are forced to get your own car, live in an area where you feel safe ... and get a good job. Here in South Africa, managed to... Come up to the ladder in my trade.” – Dolphy*

It is important to note that while some mentioned the economic opportunities, others highlight the better standard of living South Africa affords them.

*“I think just here ... you don’t have to have a lot of money to experience ... what the people [who] have money experience... ‘Cause in the Philippines it’s kinda hard. I mean for those people, like if middle class families for example they can go away weekends or do something over the weekend, stuff like that. But the normal working class people, especially if they have families it’s kinda hard in the Philippines. But here I mean ... we’re just like normal normal working class people but we get to enjoy whatever other people enjoy... So I suppose that’s really good. That’s what I like about it... we still get to go away every few weekends ... that’s nice.” – Kris*

*“Oh the biggest one is quietness, because in the Philippines it’s noisy. Remember? Very noisy country, everywhere noisy, neighborhood noisy... Stereo blasting here, people walking around in the street, tricycles... But here the quiet place... You don’t have this hustling and bustling ... Here more quiet. More discipline.” – Dolphy*

*“I really like South Africa you know, now it’s become reversed, now when I go back to Philippines I’m not feel comfortable because uh maybe because of the weather? And the traffic same in Manila so I didn’t like so when I come back to South Africa then I feel fine, because there’s no traffic like in Free State but also I mean maybe the weather—I feel free in South Africa!” – Charice*

Aside from noting their raised standards of living, some refer to non-economic opportunities for self-actualization, as well as the climate, nature and quiet spaces. Three respondents indicated economic opportunities that they had to give up in the Philippines in order to pursue the life that they now lead.

*“I just love South Africa, but it doesn’t mean that I don’t love... it just means I love what I’m doing, it’s an opportunity for me to know people from other different [cultures and it’s not very] common in the Philippines ... And the nicest thing that I would say is that the moment you talk, people listen to you. Not much in the Philippines when you talk ‘cause there’s lots of other people who talk but ... here I could sense that they would listen to you.” – Gabriela*

Despite these positive aspects, challenges are an inevitable part of adaptation. Some of the respondents relayed various responses with regards to isolation and exclusion. These range from distance from their loved ones, the absence of their usual support system to adjusting to the actual physical isolation that their new geographic situation brought about. Five of the respondents have also been victims of crime, which they recognize is a reality of life in a developing country, whether in South Africa or in the Philippines.

- ***The multicultural context***

Coming to a highly racialized context also raises the question of migrants' social inclusion/exclusion, as reflected in their different experiences:

*"Not really, there's no... Doesn't affect me because that time being Honorary White ... security's very good." – Dolphy*

*"South Africa is such a mixed culture on its own ... It's not just like you're just adapting yourself to one unified culture ... I think it's those division that I kind of struggled quite a bit. Like the African people as well they have their own ... understanding among themselves and I just couldn't understand that in the beginning. I became so sensitive" – Kris*

*"I have no problem. I have no problem interacting with all colours, White, Colored, Dark no problem. But with my crowd of friends I somehow feel discrimination from the White. ... they don't really tell you directly but the way the conversation we have and they tell you the experiences ... they don't show it that they discriminate but I can put small pieces together with their conversation. ... They don't really say everything but you can feel it... And you can just see that the distance... we can say actions speak louder than words. But for me I don't care... Some of the whites, some of them don't like Asian, don't like coloured, they like only White and White." – Jessica*

Certain barriers when it comes to socializing with locals refer to challenges as part of their adaption to a new country. These include contending with crime for five respondents, while four respondents mentioned their own explicit instances of discrimination: three in the workplace and one at school. However this has provided them with opportunities to reflect and define their place in the South African society:

*"I made it an issue in school, and that's the classic example of putting your foot ... and making sure you send a message out there that I have every right in this country as you and the rest of them are. It's because people will try ... and as I said, that when anyone lives overseas ... they decide to make it their home, that they must be prepared to make sure that they put a stand to say 'This is also my home just as like, this is your home' and as long as you're not violating any rules, you have every right." – Tina*

*"Of course you know you can't say you are white, you are brown, you are green, you must understand the culture as well so they also understand our culture. If we share something to them they learn, they will learn as well." – Maricel*

*"... I learn a lot definitely, being long here. Learned how to adapt myself to the South African way. I'm still learning up to now." – Dolphy*

Respondents appreciate the ease in which they could interact with people of different cultures, which is something they would not have had in the Philippines. Some have navigated their way in the South African context and facilitated their own integration.

After all, interactions between migrants and citizens also impact on the latter's attitudes toward the former—the absence of which correlates with negative perceptions (Crush, 2000):

*“I’m just saying that when you’re a foreigner, in a foreign land, don’t expect everybody to embrace you and accept you. But don’t take it personally, that’s one thing that I’ve learned ... you must learn to be yourself and to “fight” for yourself, for your space ... so people will respect you more. There’s always the impression here that if you are from Philippines you, obviously you’re from another third world country ... it’s a more dire situation than in South Africa and so some people here think that Filipinos here are ... begging or something like that. So what I make out of that is to show them that there are certain group of Filipinos who are educated, who have got something to give to society ... But one thing that we educated Filipino people must send a message out there is that there are a lot who are willing and who are able to contribute and has achieved something, and therefore must not be looked down upon and that you must be firm, and that you must just be proud of who you are and yourself and where you come from”. – Tina*

These aforementioned themes discuss the migrant profile and experience in a holistic effort to describe the various kinds of capital they have at their disposal: financial, social, human, and cultural (Tinajero & Sinatti, 2011). Thus a picture emerges of an empowered, engaged migrant population that has made definitive choices to remain in their host country. It could also be reflective of an innate human desire to experience the world beyond one's national confines. Conversely, the majority of the respondents expressed uncertainty about resettlement in the Philippines owing to the country's susceptibility to natural disasters, traffic, poor urban planning, and a hectic way of life.

These are tradeoffs that the respondents have considered taking into account isolation, discrimination and crimes that they encounter in the host country. It also sought to gauge the extent of their social inclusion/exclusion in the South African society that shapes their ability to participate and contribute to development. Guided by such experiences, migrant potential to be knowledge producers for development are affirmed (Piper, 2009). The question of how this migrant group contributes to the development of South Africa as well as the Philippines is then discussed.

### **4.3.3 Socio-economic contributions to South Africa**

If we are to investigate migration-development links fully and uncover their transnational potential, then the migrants' contribution to their host country as well as their country of origin should be explored (Piper, 2009). A receiving country such as South Africa, which has yet to fully realize its own development potential, presents an interesting context for this issue to be explored.

#### **4.3.3.1 Economic contributions**

- ***Financial: Consumption, taxation and investments***

Migrant consumption simultaneously sustains their quality of life just as it fuels the local economy of their host countries. South Africa also employs Value Added Tax, which makes local consumption synonymous to government revenue as well. Income tax is also derived from business investments and employment, where taxation is reliant on their legal status: residents are taxed on their worldwide income while foreigners are only taxed on their South African income (South African Revenue Services, n.d.).

Among the respondents, five pay Business Tax, seven pay Property Tax, and seven pay Income Tax. Two of the respondents are exempted from income tax due to their salary and the voluntary arrangement of their employment. Such differences in personal circumstances present challenges in gauging an average estimate of this group's consumption and tax contribution. The wide disparity that each tax renders (i.e.: 3000 ZAR Income Tax vis-à-vis 100000 ZAR Business Tax) would also present a distorted average. This is also especially because only fourteen of the estimated 200 settlers are captured, raising the limits of such a small sample and attempts to quantify. If anything this highlights the significance of incorporating other approaches in promoting a holistic picture of migrant contribution.

- ***Entrepreneurial: Services and employment***

By establishing their own businesses, migrants also provide service and employment to their destination countries. South Africa, as a country in transition, provides much opportunity for entrepreneurial agency:

*“...as a businessman one thing I know is, it takes a while to build to that growth momentum. So when I came here I saw a lot of things that actually, I know I can bring a lot of value to—from a business perspective ... There’s a lot of things that people here don’t do, which I know that can be, you can have a good market, and you know that’s why... Lots of stuff that you can introduce to the country. A lot of services that you can bring” – Juan*

Six of the respondents are involved in their own business enterprises. The industries that these cover include: construction, clothing, landscaping/farming, hospitality, service, and entertainment. The scale of these enterprises varies, suggesting diversity in the kinds of employment opportunities that they provide. Regular employees go from two to 60, while a contractual business can easily demand 100 workers depending on client needs:

*“Because you see there is a lot of Filipinos that got businesses in here so that’s [a contribution] ... to reduce the ... poverty and unemployment ... We have our own company ... we employ people like in Saldanha we employ and the other, one contract is 36 people and the other one is I think 15, and now in Bellville in here we employ 16... the other one is Plet. I think at least more than 100.” – Maricel*

In addition to employment, businesses also serve as a venue for skills and knowledge transfer. This was especially the case for a manufacturing enterprise that a respondent had in the Eastern Cape before moving to Cape Town.

#### 4.3.3.2 Social contributions

- ***Skills exchange***

Opportunity for skills transfer is not limited within the confines of one’s own business. This is also made possible in their respective areas of employment. For instance, five of the respondents moved to South Africa in the late 20<sup>th</sup> century when mass recruitment of foreign skills took place in order to prompt its own garment and mineral industries—either being the expatriate themselves or to join their expatriate partners. Training and supervision of locals are among the key tasks this entailed.

Migrants belong to different industries, which offer a diverse set of skills that benefits the country. This translates to skills beyond those that are technical. The involvement of two respondents in development work provides for a cultural exchange of values:

*“...in various trainings that I would conduct I would always give an example of the Philippines ... if there is a chance to, because it is part of the education process. I just want them to see that there are those countries that are poorer than their country ... But in terms of traditions and culture as well, it’s like I would also share what are the good cultures that we have, what are the good traditions that we have in the Philippines when you say girlfriends and boyfriends there’s no sexual relationship yet and I’m addressing this to the youth, because of the early pregnancy ... it’s an educational information ... what I’m doing now it’s like I’m bringing in my skills from the Philippines. We have a very rich heritage and culture also of volunteering so that’s one thing that I bring here ... It’s our experience, our culture and tradition that I am also bringing in here to share to them. But I don’t say that the culture is wrong, but what I’m saying is two different countries with two different cultures” – Gabriela*

Filipinos are also able to contribute to South Africa’s social upliftment through opportunities beyond their formal employment.

- **Community initiatives**

Providing material items to donation drives initiated by their schools, churches, or even their respective Filipino community groups are but some ways in which assistance is given. Among the causes that have been supported include: Meals on Wheels, Groote Schuur, CANSA, Nazareth House.

*“... we also perform at Meals on Wheel [which] is the oldest and the biggest organisation in South Africa ... So one day I actually hear[d] about this organisation so I phone[d] the manager and so I spoke to her about our association, what can we do, what can we do about, what can we do” – Community Leader B*

*“... our association ... we have [an affiliation with] CANSA ... Cancer South Africa. So we have, the other members of our association, they have a relay like a CANSA in Hermanus so they attended for the whole weekend ... And also the Meals on Wheels for the old age home ... nobody feeding there, so we also giving them a food and then to cook for them like that and then whatever that I have veg so I can give to [the Community leader] and then she can [give it to them]” – Lorna*

*“... we are a Roman Catholic and we support their [projects] ... And we have also pledge every month that it’s like type of offering to the church ... and aside from that we have every weekend and I was saying to you that if there’s a project at the church that yeah we also give money. Just now, two months ago we raised money for blankets for the poor.” - Kim*

These are active participatory development initiatives that are taking place. Filipino businesses are also aligned to groups that tackle crime:

*“...all the bed and breakfast owners around the City Bowl, they have this organization. So that’s how I involve with it ... we come together to promote, to enhance the business in a way of what’s the latest and against the crime, and employees ... Lately a lot of house burglars happening around here ... that’s where they started the Neighborhood Watch building up because of the organization of their creativity and plan ... they somehow keep in contact always with the police and the security people so it’s working together, the organization, the Neighborhood Watch and the police and the alarm people, the security alarm people so it worked together now against crimes. The neighborhood must be vigilant as well, have a lot of retired people at home they can walk with their dogs, you know just to walk around if somebody strange is walking, car standing and it’s very interesting to experience all this from the organization in the Neighborhood Watch. ... Yes, before 2 years ago... In Tamboerskloof ... I [was] involved... I liked that.” -- Jessica*

The extent of the Filipino migrant group’s inclusion in the South African society is manifested in their various contributions to the socio-economic situation of this country. How these Filipinos also contribute to their country of origin is discussed subsequently.

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#### **4.3.4 Socio-economic contributions to the Philippines**

Loyalties that migrants maintain with their home countries serve as the basis for their contribution to its development (Piper, 2009). The following chapter discusses migrants' economic and social contributions to the Philippines.

##### 4.3.4.1 Economic contributions

- ***Trade/investments***

None of the household respondents engage in existing trade. However many refer to a prominent member of the community who imports Filipino products for migrant consumption. Efforts to collaborate on enlarging this trade are underway however, in collaboration with the Philippine state representative. Where investments are concerned, only one respondent supports a micro-enterprise that a relative runs in order to sustain the family. Only four respondents have properties, and only two have definite plans to return. Most cite the uncertainty of their resettlement as the hindrance to actually investing in the Philippines.

- ***Remittances***

Estimated remittances from South Africa are at USD 6,136,000 for the year 2011, with USD 5,677,000 accounting for landbased and USD 459,000 from seabased remittances (BSP, 2012). It is the highest recorded since data has been made available available data from 2003, with an increase from 2010 figures of USD 2,358,000 (USD 2,234,000 for landbased; USD 124,000 for seabased). Preliminary findings for 2012 (Jan-May data) however has seen a -32.66% decrease compared to the same period for 2011, where -45.89% growth accounted for landbased senders, while seabased senders saw a 15000% growth. It could be presupposed that lax remittance regulations have allowed more seafarers to send remittances on their own rather than asking for favours from landbased residents. Nonetheless it is small relative to the 2011 total of USD 20,116,992,000.

At a micro-level, the respondents from Cape Town exhibit a diverse practice where remittances is concerned. Ranging from 0 to 70000 USD/year, the average remittance of the nine respondents who were able to give a figure stand at 12788 USD/year. Only three

of the respondents send a consistent amount each month. Another three admittedly do not, other than the occasional gift or when the exceptional need for it arises.

The rest have a variable experiences, where their practices have changed over the course of their stay. These have been dependent on family needs in the Philippines (such as hospitalization) as well as change in circumstances, where family members have come to migrate to South Africa. The latter in particular points to how not only the need for remittances in the Philippines has decreased, but how their expenses in South Africa have increased. Thus what emerges then is that temporary migrants send a greater percentage of their income rather than permanent immigrants do (Faist, 2008). This is especially because recipients of remittances are their immediate family members. Among the purposes of these are: healthcare, education, livelihood, and personal consumption, which tend to be variable in nature.

*“So within that six months I think I only sent money four times or three times. And then after that I came back here with my daughter, 2007 January was only able to send once in three months since my daughter started studying here so I needed to support her too”*  
– Jessica

*“...since my children are studying college here, it's very expensive so maybe I send only twice a year this time but before I'm giving them let's say, not every month but sometimes I just give sometimes 20000 pesos, sometimes, it depends... let's say if I send 1000 dollars ... is for six months ... when my father is still alive we are still sending sometimes every 2 months”* – Charice

*“It's not really a remittance it's just a gift... when they phone me I send, if I know it's for school I send”* – Alma

Aside from formal remittances, some have felt the need to explore alternative ways of facilitating money transfers:

*“Yeah sometimes I can send, because the only trick you can do is open a bank account here then you send ...because now your card here in South Africa you can use it in the Philippines to withdraw money from the ATM. So what I do, I opened a Savings account, I gave the card to my sister, I gave her the pin number so she can draw from there”* -- Dolphy

#### 4.3.4.2 Social contributions

- ***Charitable drives***

Nonetheless efforts at social upliftment also extend beyond the family to the rest of the Philippines. In a country consistently plagued with natural disasters, relief efforts provide the chance for overseas Filipinos to contribute through diaspora giving (Asis, 2008). Respondents in this study mostly participate through collective efforts organized by the respective community groups, averaging at 100 ZAR per donation. Leaders have estimated the donation amount to ZAR 3000. These are mostly done through fundraising events such as bingo or karaoke contests, among others. However these efforts are largely uncoordinated and open space for some to raise questions:

*“...well it hasn't reached my attention so I'm so sorry I wasn't able to contribute to that one... That's the thing, there's no formal way of communicating those kinds of issues. And how do we know that it has formally reached whoever is targeted?” – Tina*

Despite this, migrant social enterprises facilitate wider participation and an opportunity for people to contribute regardless of their nationality or affiliation with either group. The transnational network plays an important role in this.

- ***Transnational network***

The transnational network that Filipinos belong to allows for a wider sense of social contribution to the Philippines. This is made possible through its greater reach to Filipinos outside national territory (e.g. settlers, seafarers). It banks on social capital derived from their national identity, paving the way for participatory development (Tyner, 2009; Faist, 2008).

Cape Town as a coastal city has an estimated 500 Filipino seafarers that dock in the city every month. They are a diverse group of Filipino laborers, with some instances of illegal recruitment. It is for these reasons that the Philippine Honorary Consulate notes challenges in tracking them. Informal links and networks then serve to connect them despite “being under the radar”.

Some of the respondents through their own individual initiative and/or collective effort have offered support ranging from administrative matters to something as profound as emotional support. Through the Filipino settlers' networks, they are able to get hold of seafarers and provide assistance in sending remittances, providing information, and a sense of home/family (which ranges from touring the city to dealing with hospitalization). They also serve as the link between seafarers and authorities, especially where of abuse and salary, as well as accident and death are concerned. There have been occasions where members of the migrant community have stepped up to provide assistance such as informing the media or sorting out legal matters when formal procedures have been too bureaucratic for the urgency at hand.

*“... when they come to know us, most of them—all of them know us already ... if they have problem in the ship, the first thing they do is tell me the problem—if somebody got sick, or somebody got stabbed or somebody have a problem with the captain then they tell us those stories. And that's why we are always the firsthand ... that come to know all these problem and then if we think that they need help, further help then I can always phone the embassy ... They come here for the problem like that ... a serious problem, that they kill somebody in the ship. The embassy people come when I phoned them and then I also informed the Seaman's Mission” -- Amalia*

Assistance is also extended to settlers themselves, especially on occasions of accident, illness, and death.

*“... ten rand per month at the time so at least if something happened to the Filipino ... then we can help them ... my nephew, he got an accident and the other Filipino who is traveling with them ... So now we have the money that we donate... you know the ten rands per month it helps. We give all the money to them, 51000 just to help them” -- Charice*

Through the formation of 'transnational communities', migrants are being affirmed in their role as agents of development in the South (Hujo & Piper, 2007). These manifest social capital in action, which supplement the group's small-scale economic contribution to the Philippines and South Africa. How they may partake in improving Philippine-South Africa relations is then discussed.

### 4.3.5 Improving Philippine-South African relations

The previous sections show migrant capacity for transnational development, both in economic and non-economic terms. In harnessing the migrant capacity for development, this section explores existing conditions that compromise their capacity, as well as specific channels through which this potential may be realized. Moving away from a client-based regard, migrants should be considered as stakeholders in development, by recognizing, respecting and considering approaches unique to them (Piper, 2009).

#### 4.3.5.1 Challenges to maximizing the diaspora's potential

- *Issues of conflict and cohesion in the Filipino community*

The Filipinos' community-level social contributions to both the Philippines and South Africa are channeled collectively, rather than at a single household level. These contributions affirm the role of migrant networks in spurring development in transformation countries (Faist, 2008).

However the present Filipino community in the Western Cape is currently divided between two major groups. Personal conflicts institutionalized at the group level compromise the capacity to mobilize the community as a collective unit. Differences in leadership styles concerning transparency and democracy were also raised. Nonetheless, all interviewees have at one point or another expressed their lament over the division, and nostalgia for the old days when they were "like one big happy family". These conflicts have caused such polarization many feel compromises their interaction with people from "the other" group, which is a shared sentiment across affiliations:

*"... for me it's fine it seems the same as before but the difference is we are not together as a group in one. So that is the only difference, I miss it as well because when the time when we was in the FILSAF, so we [were] together everybody ... now it seems like there's a limit, there's like you want to phone this person but leave it... because you know the other person say "so and so phoned me and telling this" and then you know, spread to the whole community ... that is the one thing that I don't want as well ... Yeah it's so difficult hey... it seems they generalize it. So it means to say that they're angry with the whole association because I'm angry to that person. I'm hoping. I'd love to be in one again but ... I cannot be the one that who will initiate it. It must be somebody in the middle to initiate it" – Lorna*

*"This is bugging me for a long time because ... as you know we have these two separate communities ... I've talked to them about combining but noone wants to do it so... who*

*am I to ... you can't tell them this because then you'll be the one caught in between ... And you know what's happening, when you're on the other side, when you're on that group, and if you want to mingle with others, it's like so hard for them because what they're going to say on your side? ... why not mingle with everybody it's fine don't have to just stay on this side because you don't have to, we're all Filipinos" – Sisa*

*"Sometimes it gets a bit awkward because I have friends in both sides and in the beginning I didn't really wanna be ... a member of one group. I didn't want to be for a while, I really really refused to officially be a member. But then I realized later on that okay maybe they're just gonna kick me out of I don't really sign up already ... so it's very difficult because you don't wanna hurt people's feelings, but then again in the end I just think if they don't understand your position or where you're at, you can't really please everyone ... it's so difficult obviously, I wish, I still wish that everyone was still one and united and there shouldn't be an issue ... It gets hard but I wish there should be a unified force if that's what you can call it." – Kris*

Some believe that the lack of a formalized organization with clear identifiable goals leaves space for intrigues and gossiping to thrive, thereby limiting their participation.

*"...the reason why I don't need to have an affiliation with this Filipino community here in Cape Town it's because of the picture that they're trying to paint, as a Filipino community. I am not happy actually because blahblahblah-blahblahblah ... the competition is too much ... you have to understand that each has political and you know personal agenda" – Gabriela*

The conflict divides resources, compromises solidarity, and undermines their potential to make a bigger difference to both South Africa and the Phillipines:

*"Yeah I think that Filipino community must have an open communication and oneness because sometimes misunderstanding if we don't communicate—it divides the community. And also sharing resources, sharing knowledge, ideas and values. I'm sure they will flourish..." – Alma*

Access to resources is hindered as each community presents a strength that is beneficial to development initiatives: one group's wide network in the South African society and the other's network in the logistical/shipping/seafaring industry. The community as a place for gathering the different "types of migrants", (e.g.: skilled, settlers, contract workers, spouses) should also be taken advantage of where different kinds of capacities may be utilized to realize common ends (Faist, 2008). After all there are key areas of convergence for both communities owing to shared migrant experience.

- ***Limited Philippine government presence***

There is recognition within the Philippine Foreign Service that it is “a country with inferior resources” in terms of financial capital (Macaranas, 2004:51). This belief is manifested in the fact that the Philippine representation in Cape Town is a one-man Honorary Consulate, whose key mandate is to focus on macro-scale issues of economic diplomacy and seafarer welfare.

*“...my belief is in Cape Town, I’m probably the only businessman that is here among all the Filipino community. So that already would give you an idea, why would the government spend effort on one individual? If you ask South Africa, I would say majority of them wouldn’t even know where is Philippines. So that shows you the relationship between the two countries... Is there opportunity? Yes, but it was just never been promoted ... for someone like me who understand these kind of things, I’m too busy sorting out my own problem... the last thing I want to do is to spend effort and try to promote the trade between the two countries when these kind of things takes a lot of time and you need to be consistent” – Juan*

In pursuing other socio-cultural matters, there is the need for more resources in the form of both financial as well as administrative capacity for community outreach, overseas voting, as well as processing of Philippine documentation. Efforts have also been made in reconciling the conflicting groups. Yet unlike other diasporas, the absence of a unifying entity in the form of church or strong state representation undermines the Western Cape diaspora. However this situation leaves space for initiatives to thrive in order to address these challenges. Migrant agency is increasingly recognized by other roleplayers in migration such as the state (Faist, 2008):

*“...I believe in teamwork, and I believe that if we can bring the community together ... someone who’s born and bred there will also have ideas, will be exposed to more things ... But if you work as a team, you know, somebody might know somebody and together there’s a way that one can expose things and pull on those resources to be able to help” – Philippine State Representative*

- ***Dependency and sustainability***

Despite efforts to participate in Philippine development, existing initiatives present limitations in terms of dependency and sustainability, as well as the question of resettlement/circular migration.

Questions of dependency and sustainability are present in initiatives such as remittances and donation drives. Not everyone sends remittances. Those who send are also variable depending on the family's circumstances. One specific interviewee also raised her hesitation owing to the concern of her siblings being solely dependent on her, rather than employing their own agency:

*“I don't like sending too much. I just send enough for my mother and my father because I don't want my siblings to just rely on me... I don't like that, 'cause during my time I worked hard for myself even I'm still young ... 'Cause the mentality there ... I can see. They rely, don't study well, get married young” — Jessica*

Interestingly, this also has implications at the macro-level. Concerns over the Philippine economy's reliance on migrant remittances have been raised (Gonzales, 1998; Vasquez, 1992). Even for social purposes, the same question is raised where donation drives only take place when the need for it arises, such as natural calamities. Policymakers and the academe have since then focused on more sustainable migration-development initiatives. Efforts for home country development was anchored upon the goal of reducing migration (Faist, 2008).

Measures such as resettlement programmes and circular migration have been formulated. However circumstances of this target group present challenges where resettlement is uncertain, and the high travel costs limit the ease with which they can travel to the Philippines. Of those interviewed, only three have definite plans of resettling back. Nine of the respondents have visited the Philippines. The frequency of their visits depended on the need and resources, given the distance and high cost of airfare. Finding alternative ways of integrating them within national development initiatives despite their physical distance is then necessary.

#### 4.3.5.2 Potential areas for cooperation

Identifying a sustainable initiative for migrant participation necessitates a people-centred approach, which regards migrants as actors and takes “their own visions of development” into account (Piper, 2009:94). They represent links in both countries that can facilitate the transfer of technologies and resources “between cultures, economies, and societies participating in international financial and knowledge networks” (Brinkerhoff, 2006;

Strauss, 2007). The following section details the group's perceptions with respect to prospects for cooperation between the two countries. Dominant themes that were identified include trade/industry, development, and culture.

- ***Multilateral trade networks and industries***

Multilateral trade networks present another means through which the migrant community may utilize its transnational advantage for development. This is also in line with current Philippine foreign policy of prioritizing economic diplomacy, thereby offering new avenues for involvement. There is increased recognition for the place that civil society and the general public can take in the trade agenda (Hocking & McGuire, 2004). Through their transnational network, migrants are able to establish of trade between their host and home countries through what international migrants establish as “a vital social link among different sectors of the global economy” (Munck, 2005:107). Insights are also valuable in facilitating trade between the two countries. Drawing from their experience in industries, coupled with actual entrepreneurial experience, the respondents said:

*“As far as I know the Filipino, say products, is not yet introduced here. And obviously South Africans are not aware of that. So if you can do something to make them aware of that ... because like Thailand they are extremely aware or China. They're aware of what they can offer, of what they have, what they can do. ... Thailand's also a small country like us but they're very visible here ... just the other week or few weeks ago they had the trade show at the CTICC I mean that's such a good thing to do. ... if we Filipinos can get to that level how wonderful it is” -- Kris*

*“But that's the catch, you know, every developing country wants to go to the developed country ... you tend to go with the hype, forgetting that there's other opportunity lying out there that is untapped. Everybody wants to trade with China, so everybody's competing against each other in terms of trade with China. Like in any business, when there's a market and then that market becomes too competitive, then everybody lose out. But if you try to find and develop your own niche market, then you have a better chance of succeeding because there are probably only 2 or 3 of you doing that. It becomes more productive rather than wasting all your energy focusing on something that a million guys is doing.” – Juan*

The respondents also identified the following industries: mining, seafaring, agriculture, urban development, commodities trade (e.g. South African wine and olives, Philippine mangoes and native weaving products). Incidentally, these are industries that the current

Philippine administration seeks to prioritize as well, with new policies being drafted concerning mining.

- ***Development issues***

Beyond economic matters, the respondents were also asked about areas in which both countries can learn from each other. Guided by their firsthand experience of residing in both countries, the respondents identified the following issues such as infrastructure, corruption, skills training and policy as a springboard for cooperation:

*“...in terms of as a democratic country you know, there’s a lot, Philippines’ more mature than South Africa. And the government has more experience than South Africa, so South Africa can learn a lot from the mistake of Philippines, a lot. Corruption, both countries in my mind, has a lot to learn about to tackle the problem of corruption in government. And South Africa cannot learn from Philippines because Philippines is about as corrupt as South Africa but they can learn from the mistake and vice versa. So that and in terms of... being, I would say productivity. That’s the thing that I can see wherein both country really needs to be better at ... I look at Philippines, I look at South Africa, both of them are almost same in terms of politics, in terms of socioeconomic, because yon [there] a high sector of the population that are poor and you have a very small percentage of that population that are very rich so in that sense both of them are the same.” – Juan*

*“Because it’s only now that they’re starting to put Black South Africans in the ship as sailor, as seaman, which we have. Filipinos are very famous for being a seaman because we have a lot of schools—marine schools in the Philippines. That’s our friend who has a school ... he is always asking help from us but we are so helpless, we want to ask ... our government—we must communicate with them because we can make a big project for our people. I mean we want to connect them because ... in our stay here, we have accumulated few people from the government here that are very good to us. Good friends of us. And hearing the projects, there’s a huge, huge opportunities for the Filipinos to make money here, if they will allow us ... our people can contribute a lot here, and at the same time they can gain knowledge and also business in coming here..” – Amalia*

- ***Values and culture***

Migrants affect their host countries’ society and culture as they bring their own (Munck, 2005). This resonates with the respondents in other ways as well, regardless of their actual involvement in development work. Cultural cooperation between the countries is another facet that needs to be developed. Values exchange is one that can be capitalized in prompting mutual development for both countries:

*“...Because in our country, before when I was brought up in a very conservative way, of course you must marry, get children and all that and in our country for example you have a baby out of wedlock and they look at you like differently ... I can see it here, they don’t*

*care who you are, no matter where you come from. I think it's their culture and I can see it's one advantage that after everything that you've been through, there is someone who will love you for what you are and you can still have a bright future ahead of you... in fairness to the culture of South Africa I admire them for their culture of being open-minded" – Kim*

*"...the alcohol is very very high in here in South African men ... we Filipinos, because we don't really drink ... they learn from that ... they see 'Oh the Philippine women are really admirable' ... so that's a contribution also how they learn, how we live in the Philippines without that. I said to them 'You know you can go, you can party without that. Because us as a Filipino I can share it to you we don't enjoy ourselves in alcohol. We enjoy the food and the company, the community'" – Maricel*

*"...maybe be more focused, be more business-minded and not let personal differences or personal feelings get in the way ... I think Filipinos we get very personal most of the time and it's not good ... I mean this is why there is a division anyway. How can we be unified if there's always personal interest getting in the way. So I think we should learn from them." – Kris*

*"South Africa is not bad and of course compared to Philippines, Philippines is third-world country and in different way maybe they can exchange knowledge because these two countries have different cultures" – Jessica*

Proposals include social events such as a food festival, which can also serve as a platform for attracting traders and investors. Cape Town as design capital of the world in 2014 also provides prime opportunities for the Philippines to enhance its presence in the international art scene.

*"...when I spoke to my friend, because he said 'I cannot go there' we were expecting him to come here, 'I cannot go there I do not have time anymore. It's so short, I have to exhibit my work, there's no more painting for you to exhibit there because everything is gone there' so I said 'but you can come here, you can come here only for a little short time ... if you can please teach these local people ... art, give them some lecture for Filipino arts even for one week. They can pay, we can organize that, I will organize a gallery here in Cape Town'" – Amalia*

These findings present the economic and social contributions that the migrant community provides to their host and home countries. Non-financial capital is especially pronounced where economic, social, and cultural development are concerned. Respondents also identified challenges that hinder full utilization of their potential. In the same vein, prospective areas of cooperation between the two countries reflect existing complementarities and similarities. After all there is the question of the dynamics between transnational networks and the host country's political and social policy systems

(Hujo & Piper, 2007:23). All in all, these provide the basis for social organization, in terms of necessity as well as actual capacity. A newfound solidarity amongst the two splinter groups as well as between the two countries would open up new possibilities:

*“I love to do something for Cape Town community but I cannot do it alone. I can volunteer to do it, I need them to support as well. I’m willing to journey with them in the process but it takes time to start.” – Gabriela*

*“I believe that maybe given the opportunity I can do a lot to improve the relationship between the two country and to develop the opportunity between the two country, but I’ve more important fish to fry... When I get to a certain point in my life that I believe I am now in a position to do that, will I do it? I will ... as much as I’m thankful to Philippines that nurtured, that teach, allow me to develop into who I am right now, I’m also grateful to South Africa in a sense that it’s giving me the opportunity to pursue what I want to pursue. So do I owe—to whom do I owe more? I would say, I don’t know, but I do recognize the fact that I owe both a certain debt of gratitude. So do I want to pay back? Yes, but if opportunity came.” – Juan*

#### **4.4 CONCLUSION**

This chapter presented findings derived from the qualitative study that this research employed. It established the Filipino migrant community in South Africa as an empowered group, in terms of their profile as well as their contributions. Their views on improving Philippine-South African relations were discussed by identifying challenges and opportunities to do so. The subsequent concluding chapter presents a synthesis of these findings, as well as recommendations.

## V. CONCLUSIONS AND RECOMMENDATIONS

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### **5. INTRODUCTION**

The following chapter presents the main conclusions emanating from the findings and will be presented according each research objective. Furthermore, some recommendations are made which are based on these conclusions. Finally this report is brought a closure with a concluding statement.

### **5.1 MAIN CONCLUSIONS**

#### **Objective 1:**

#### **To discern the socio-political-economic context of the Philippines and South Africa in relation to the issue of migration**

As transitioning countries, the Philippines and South Africa each provide a backdrop to complex realities that shape development and migration dynamics. These also offer untapped potential for consideration of the migration-development nexus.

Congruent with advances in the development discourse, the Philippine government has begun to regard migration as an economic possibility that extends beyond financial remittances. Other avenues for nation-building that do not include return and resettlement are now being explored. The Filipinos in Cape Town exhibit these realities in their motives for migration (Section: 4.3.1), as well as in the different initiatives that they engage in (Section: 4.3.4).

South Africa's increased international prominence, coupled with its history of structural inequality, creates conflicting realities as a host country to people from within and beyond the region. This scenario has led to social xenophobia manifested in varying degrees. In the same vein, domestic poverty and unemployment can benefit from migration through the flow of economic and skills resources. To this end the Filipino respondents make various social (Section: 4.3.3) and economic (Section: 4.3.2) contributions in South Africa.

The kind of Filipino migrants that South Africa attracts (Section: 4.3.1.), and the perspectives that their migrant experience equip them with (Section: 4.3.5) present the role of migrant agency in south-south migration. Thus there is a clearer understanding of what a migrant group can offer its host country, as well as its country of origin with regards to mutual development.

### **Objective 2:**

#### **To establish a socio-economic profile of Filipinos living in the Western Cape**

The Filipino migrants in Cape Town represent a diverse group of empowered people, relative to the population of their home and host countries.

Empowerment of the respondents is primarily assessed by their education, employment, and motivation (Section: 4.3.1). All respondents have had post-secondary training, with a majority of them completing tertiary education in various disciplines. The respondents have all been legally employed in both the Philippines and South Africa. They also showcase an equal majority for professional and personal reasons for migrating, which questions the extent of economic incentives in their decision to settle in South Africa.

In capturing their migrant experience (Section: 4.3.2), it has been found that the group is generally satisfied with their quality of life in South Africa. This is reflected in their ambivalences about resettlement in the Philippines. Drawing from this the quality of life that they experience in their host country, together with a sense of empowerment, make up for migrant challenges that they face. Thus they appear to have put their 'roots' down in the host country. They are not merely economic actors who can be enticed to return to their home country on the sole basis of improved financial conditions (Section: 4.3.2.2).

This level of welfare alongside their common experience in both countries, afford them the potential to mediate as agents of development cooperation between the two countries. The latter is especially reflected in the various ways they can transform preconceived notions that exist in each country toward the other (Section: 4.3.2.1).

### **Objective 3:**

#### **To identify their contributions to the social and economic upliftment of their community in South Africa**

Filipinos in the Western Cape contribute to their host country through their consumption, taxes, enterprises, skills, and social initiatives (Section: 4.3.3).

Financial contributions to South Africa are primarily through consumption and taxes (Section: 4.3.3.1). The latter are derived from personal transactions, income, and properties. Collecting an average estimate for this data proved to be challenging. Factors that contribute to this include its idiosyncratic nature, the group's small scale, as well as uncertainty on the part of some respondents to reveal their complete financial statuses, all of which compromise accuracy in reporting on this area. Nonetheless Filipino migrant enterprises serve as a vehicle for providing services, employment, and skills transfer in South Africa.

The arrival of these skilled migrants to train locals also highlights the nuances present in migration-development nexus (Section: 4.3.3.2). Skills transfer is a key social contribution that this migrant group offers through the different sectors they represent.

Another form that migrant participation may take is engagement in different community initiatives that they have been involved with, or developed themselves. This serves as a more sustainable option for Filipinos in Cape Town given their minimal economic contribution to South Africa (Section: 4.3.3.2).

Knowledge exchange and social involvement serve as instruments for development cooperation amongst developing countries. Through these micro initiatives of a migrant group, broader macro linkages could be facilitated in furthering the aims of south-south cooperation through south-south migration.

#### **Objective 4:**

##### **To identify their contributions to the social and economic upliftment of their community in the Philippines**

Migrant investments, remittances, donations, and transnational migrant networks, all make a significant contribution to the home country (Section: 4.3.4).

Quantifying economic contributions of this group of respondents to the Philippines render minimal findings (Section: 4.3.4.1). None of the respondents currently engage in trade between the two countries. In terms of investments, only one of the respondents has a running micro-enterprise, and only four have properties in the Philippines. The uncertainty of whether they would like to return is cited as the main reason for hesitations to invest in the Philippines. Financial remittances are also minimal. The small number of Filipino migrants reflects low figures at the national scale. Even within the parameters of the study, only three respondents consistently send remittances every month. Various factors at the household level also affect the frequency and amount of remittances.

Nonetheless contributions of these respondents go beyond economic measures (Section: 4.3.4.2). Their social contributions to the Philippines mostly take the form of mobilizing donations during times of natural disasters. However this is undermined by inconsistent efforts at the household level. Collective action on the part of this group also appears to be stymied by a lack of coordination due to interpersonal factors.

On the other hand the transnational migrant network provides an opportunity for servicing fellow Filipinos abroad. As a coastal city, Cape Town serves as a port for Filipino seafarers who, when in need of assistance, are provided with support from the Filipino migrant group in Cape Town. Assistance is also given to Filipino settlers who are in need especially in times of emergency.

Altogether, these represent a different approach for the migrant group to partake in Philippine nation-building. It is an alternative that is derived from and therefore caters to their contextual circumstances.

## **Objective 5:**

### **To determine how these potential contributions can be maximized to further Philippine-South African cooperation**

Harnessing migrant contribution to further Philippine-South African cooperation involves recognising its potential and addressing the challenges that undermine this (Section: 4.3.5).

Challenges that were identified are community conflict, limited Philippine state presence, and shortcomings of existing migrant initiatives (Section: 4.3.5.1). Conflicts hinder the community's potential. Respondents indicate widespread conflict among various Filipino groupings, which they feel undermines the Philippine national image, while impacting on community involvement and resource generation. The official home country representation in the area is compromised by the limited capacity of the Philippine state. It poses problems where there is a need to address internal community issues in a neutral venue. The existing migrant initiatives also raise issues of dependency, sustainability, and scale of impact.

Consistent with the spirit of civil society, the community exhibits the potential to step in where the state fails to provide. For instance the Filipino migrant group's small scale does not render them a priority in the establishment of an official consulate. Given this lack of state representation, the migrants have an opportunity to take their development into their own hands. They also hold ideas as to how relations between the two countries could be improved (Section: 4.3.5.2). In addition to the contributions previously alluded to, the respondents shared common goals and ideas for initiatives that relate to:

- Promoting Filipino identity (multilateral trade networks, cultural events)
- Knowledge exchange (technical skills, development experience, values)
- Social issues (seafarer welfare, natural calamities, employment, skills database)

Addressing these challenges and opportunities could provide the vision for maximizing migrant agency in facilitating greater cooperation between the host and home country.

## **5.2 RECOMMENDATIONS**

With the view of realizing and enriching the study's general aims, the following recommendations, approaches, and further research are being proposed. These are derived from conclusions presented in the previous section.

1. Develop strategies for addressing Filipino migrant issues by:

- Establishing a coordinating body that could deal with conflict and move the groups towards achieving goals that benefit all of them
- Conducting a thorough skills inventory so that a resource pool can be identified and used for the benefit of all

2. Align migrant socialization towards productive endeavors that address socio-economic concerns. This could be accomplished through:

- Prompting initiatives that build social capital
- Workshops that focus on developing the similar values of their host and home country (South African '*Ubuntu*' and Filipino '*Bayanihan/Kapwa*'), which can be applied in addressing community division, while facilitating the potential for greater understanding between the two countries
- Encourage opportunities to promote self-help and to contribute to socio-economic projects

3. Given their small scale, consolidating their resources and initiatives are necessary for effective transnational nation-building.

4. Limited Philippine state representation could be regarded as an opportunity to work closely with the Honorary Philippine Consulate for mutual support in administration of various efforts relevant to Filipinos in Cape Town.

5. Integrating the Filipino community in the Western Cape to the Commission on Filipinos Overseas D2D programme could provide guidance and networks beyond South Africa that would strengthen initiatives.

### **5.2.1 Approach: Critical peace building**

Guided by a *Critical Peace Building* framework (O'Brien, 2009), the Filipino migrant community can tap into existing links between Community Development and Conflict Resolution. This can be applied through the creation of an entity that provides space for translating capacity into productive endeavours that address various social issues. It simultaneously presents an environment where people to come together for a common goal that benefits all and helps with transcending differences. The diaspora can then serve as a place for gathering and maximizing different migrant capacities.

Albeit in varying degrees, interest in involvement was expressed by the respondents. A common concern expressed by respondents is their pre-occupation with work and life, which hinders full participation and carrying out of initiatives. The focus group discussion specifically saw the participants' interest in establishing a formal organization, which would pave the way for a more consistent undertaking. This entity was proposed to the greater community (see Appendix F:100) with the view of the native Filipino value of *Bayanihan* in realizing the following:

- Micro-enterprise: Rapid Savings Mobilization Programme
- Trade: Multilateral Trade Networks, Exhibitions
- Welfare: Seafarer patrol and charitable functions
- Administrative: Processing of Philippine documents
- Culture: Celebration of Philippine festivals
- Advocacy: Updates on Philippine politics, society, issues

### **5.2.2 Further research**

This present study is a small-scale research done with a limited sample of respondents. A survey approach extending into all known Filipino migrants in the country could provide one with a more holistic picture of the Filipino reality in South Africa. Furthermore a mixed methodology approach would give a richer nuance in that the quantitative data would be supplemented by the subjective experiences and perceptions of the respondents. Focusing on challenges and potential facing Filipino youth and Filipina women in South Africa could also provide interesting themes for further research.

### **5.3 CONCLUDING STATEMENT**

This research built on the idea of migrant agency at the micro-level in order to understand its possible impact on the macro migrant-development discourse.

The study is limited in that it is carried out at a micro-level by investigating a comparatively small group of migrant Filipinos living in the Western Cape and their contributions both to their country of origin and their host country. It was pursued with the view of opening the discourse in various ways by exploring the following issues:

- Factors that impact on the development of host and home countries, as well as the prospects for migrant contributions towards furthering their South-South Cooperation
- Gauging the challenges and the potential of translating micro-scale research for influencing macro level strategies
- Recognizing the value of non-economic resources for development

Such a situation creates an environment conducive for bottom-up diplomacy. Through the various resources and capital migrants have at their disposal, they are able to simultaneously partake in both countries' nation-building while fostering better relations between the two. Migrants could serve as agents of development diplomacy by facilitating transactions between countries through resources unique to them.

By prompting a context-sensitive participatory development for them, one is able to move beyond the narrow view of development as minimizing migration from home countries. Furthermore, the respondents' regard for non-economic factors such as the environment and socialization, point to the fact that human mobility is fuelled by factors beyond economic opportunities. Rather human mobility is an exercise of innate human freedom.

The opportunity to exercise one's human freedom to participate in nation-building regardless of one's location makes for a holistic and novel approach to international development. People-centered diplomacy can thrive—that is, sustainable international development diplomacy by the people, for the people.

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# APPENDICES

## APPENDIX A- LETTER OF PERMISSION TO CONDUCT ACADEMIC RESEARCH

UNIVERSITY OF CAPE TOWN



Department of Social Development  
University of Cape Town•Private Bag  
Rondebosch 7701 •South Africa  
Telephone: +27(21) /650-3483/650-3493  
Fax No.: (021) 689-2739

**Masters Supervisor: Dr. Connie O'Brien**  
**Senior Lecturer (Postgraduate Research)**  
**Tel: 021 650-3480**  
**E-mail: [constance.obrien@uct.ac.za](mailto:constance.obrien@uct.ac.za)**

16<sup>th</sup> April 2012

Dear Sir/Madam

**RE: Permission to Conduct Academic Research**

My name is Maria Irina T. Velasco. I am currently studying towards a Master of Social Science Degree in Social Development at the University of Cape Town. Part of my course requirements is the completion of a minor dissertation entitled "*Exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their host and home countries*". It is a qualitative exploratory study that will rely on face to face in-depth interviews. (See attached a copy of the interview schedules).

I am requesting permission to undertake interviews with members of the Filipino community to gather the necessary data for my study. I would also need the expert insights of the International Organization for Migration as well as the Honorary Philippine Consul based here in Cape Town.

As a researcher, I strictly adhere to the University of Cape Town's Code of Research Ethics. The information provided will be confidential. As a Master's student I do not represent the interests of any government body, both here in South Africa or in the Philippines, or that of any other organisation.

The main aims of this research are to document the profile of Filipinos in the Western Cape; identify their socio-economic contributions to the Philippines and to South Africa and how these contributions could be maximized to further cooperation between the two countries.

I am being supervised by Dr. Connie O'Brien, a senior lecturer in the Department of Social Development at the University of Cape Town. For any queries, please refer to the contact details above.

Finally, thank you in anticipation of your much valued participation. I look forward to collaborating with you.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Maria Irina T. Velasco'.

Maria Irina T. Velasco  
Telephone: 078 478 2308  
Email: [irina.velasco@uct.ac.za](mailto:irina.velasco@uct.ac.za)

Supervisor:

# APPENDICES

## APPENDIX B- SEMI-STRUCTURED INTERVIEW SCHEDULE: HOUSEHOLD QUESTIONNAIRE

### **Semi-structured Interview Schedule:**

#### **Household Questionnaire**

*Exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries*

#### Introduction

I am Irina Velasco, a Filipino student at the University of Cape Town who is working towards her Master's degree in Social Development. My research project is exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries.

#### Purpose

The purpose of this interview schedule is to gather that would support the study. In particular, it seeks to uncover data regarding:

- The profile of Filipinos living in the Western Cape
- Their socio-economic contributions to the Philippines and South Africa
- Their potential for contributing to improved Philippine-South African relations

From here, the hope is to recognise the value that the migrant community has in development, as well as uncovering new ways for realising this. Through your valuable insights, we are able to back this up with human realities that would deepen the study's significance.

This interview will be recorded to ensure the accuracy of your input.

#### Research ethics

Your valued participation will adhere to the University of Cape Town's Code of Research Ethics. It ensures confidentiality of this interview, as well as regard for your right to privacy and preferences. Kindly express clarifications, comments, and request to discontinue, should they arise at any point in this interview. An alias will also be used to ensure your anonymity.

Please sign below if you would like to participate in the research project.

The interview should take approximately 30-60 minutes.

---

**Date:**

**Signature:**

## APPENDICES

Who is your favourite famous Filipino personality (Alias):

---

### I. Profile of Respondents (Head of Household)

#### A. Details of emigration from the Philippines

1. Where in the Philippines do you come from? (probe)
  - a. What languages do you speak<sup>1</sup>?
2. When was the last time you visited the Philippines<sup>2</sup>?
3. How long has it been since you left to emigrate from the Philippines?
4. Did you move to South Africa straight away?
  - a. If not, where else?

#### B. Details of immigration to South Africa

1. What brought you to South Africa<sup>3</sup>? (probe)
  - a. When did you first arrive in South Africa<sup>4</sup>?
  - b. Where did you first settle in South Africa?
    - i. If not in WC, when did you move and why?
  - c. What was your legal status then?
    - i. Do you still carry the same permit? (probe)
  - d. What was your first occupation/industry?
    - i. What is your current occupation/industry?

#### C. Details of settling in Cape Town

1. Which suburb do you live in?
2. Whom do you live with?
  - a. How many are there in your household<sup>5</sup>?

---

<sup>1</sup> Raise ease of transition/move to SA due to English language

<sup>2</sup> Ask about possession of Philippine passport

<sup>3</sup> Note if they had contacts prior to moving

<sup>4</sup> Note if pre-1994, if so, probe

## APPENDICES

### II. Details of migrant experience in South Africa

1. What kind of investments have you made here<sup>6</sup>? (probe)
  - a. Do you have a business<sup>7</sup>?
2. What has living in South Africa been for you like? (probe)
  - a. What has been good about it?
    - i. Socially<sup>8</sup>
    - ii. Economically<sup>9</sup>
  - b. What challenges have you faced since living here?
    - i. Economically
    - ii. Socially<sup>10</sup>
3. What kind of social organisations/causes have you supported here<sup>11</sup>? (probe)

### III. Value of migrant experience

1. Over all, how does it compare to the life that you had in the Philippines? (probe)
2. What prompted you to leave the Philippines<sup>12</sup>? (probe)
3. How do you feel has your decision to migrate here contributed to you and your family's development? (probe)
  - a. Do you send remittances to the Philippines?
    - i. How often do you send remittances to the Philippines?
    - ii. How much do you remit to the Philippines?
    - iii. Who are the recipients of your remittances?

---

<sup>5</sup> Note if living with family, probe (if not, ask plans of moving the rest); link with next section

<sup>6</sup> Eg: Land; probe number and value

<sup>7</sup> Business, kind, scale in terms of annual income and number of employees

<sup>8</sup> Probe, clue in for social integration with their local community here, opportunities for participation

<sup>9</sup> Inquire about monthly income, annual tax

<sup>10</sup> Probe, challenges in terms of crime, poverty

<sup>11</sup> Probe, how (number of hours volunteered, kind and amount of donations made)

<sup>12</sup> Relate to context

## APPENDICES

- iv. For what purpose are these remittances?
4. Do you feel like you contribute to the Philippines' development? (probe)
  - a. What kind of investments do you have in the Philippines<sup>13</sup>?
    - i. Do you have a business<sup>14</sup>? (probe)
  - b. What social causes do you support in the Philippines<sup>15</sup>? (probe)
5. Do you have plans of moving back to the Philippines to re-settle<sup>16</sup>? (probe)

### IV. Philippine-South African relations

1. Perceptions between the two countries
  - a. What do the people back in the Philippines think when you tell them you are in South Africa<sup>17</sup>? (probe)
  - b. What do people in South Africa think when you tell them you are from the Philippines?
  - c. How do you usually react to these<sup>18</sup>? (probe)
2. Do you think there is potential in furthering Philippine-South African relations<sup>19</sup>? (probe)
  - a. How do you think will this benefit you, your communities and country? (probe)
  - b. How do you think is this possible?
  - c. Will you be interested in being a part of this? (probe)
  - d. How do you think will you be able to contribute to this?

### Final comments, suggestions and questions

Do you have any final words you would like to add?

*Thank you for your time and participation! The findings and the final document will be made available to you should you be interested in reading them.*

<sup>13</sup> Eg: Land; probe number and value

<sup>14</sup> Business, kind, scale in terms of annual income and number of employees

<sup>15</sup> Probe, how (number of hours volunteered, kind and amount of donations made)

<sup>16</sup> Probe, why or why not

<sup>17</sup> Probe, perceptions and impressions of SA in PH

<sup>18</sup> Probe, see prospects for how they mediate and present one country to the other

<sup>19</sup> Probe, why or why not

# APPENDICES

## APPENDIX C- SEMI-STRUCTURED INTERVIEW SCHEDULE: FILIPINO COMMUNITY LEADERS

### **Semi-structured Interview Schedule:**

#### **Filipino Community Leader: Filipino Social Club of Cape Town**

*Exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries*

#### Introduction

I am Irina Velasco, a Filipino student at the University of Cape Town who is working towards her Master's degree in Social Development. My research project is exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries.

#### Purpose

The purpose of this interview schedule is to gather that would support the study. In particular, it seeks to uncover data regarding:

- The profile of Filipinos living in the Western Cape
- Their socio-economic contributions to the Philippines and South Africa
- Their potential for contributing to improved Philippine-South African relations

From here, the hope is to recognise the value that the migrant community has in development, as well as uncovering new ways for realising this. Through your valuable insights as community leader, we are able to back this up with key perspectives that would deepen the study's significance.

This interview will be recorded to ensure the accuracy of your input.

#### Research ethics

Your valued participation will adhere to the University of Cape Town's Code of Research Ethics. It ensures confidentiality of this interview, as well as regard for your right to privacy and preferences. Kindly express clarifications, comments, and request to discontinue, should they arise at any point in this interview.

Please sign below if you would like to participate in the research project.

The interview should take approximately 30-60 minutes.

---

**Date:**

**Signature:**

# APPENDICES

## **Semi-structured Interview Schedule:**

### **Filipino Community Leader: Kabayan**

***Exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries***

#### Introduction

I am Irina Velasco, a Filipino student at the University of Cape Town who is working towards her Master's degree in Social Development. My research project is exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries.

#### Purpose

The purpose of this interview schedule is to gather that would support the study. In particular, it seeks to uncover data regarding:

- The profile of Filipinos living in the Western Cape
- Their socio-economic contributions to the Philippines and South Africa
- Their potential for contributing to improved Philippine-South African relations

From here, the hope is to recognise the value that the migrant community has in development, as well as uncovering new ways for realising this. Through your valuable insights as community leader, we are able to back this up with key perspectives that would deepen the study's significance.

This interview will be recorded to ensure the accuracy of your input.

#### Research ethics

Your valued participation will adhere to the University of Cape Town's Code of Research Ethics. It ensures confidentiality of this interview, as well as regard for your right to privacy and preferences. Kindly express clarifications, comments, and request to discontinue, should they arise at any point in this interview.

Please sign below if you would like to participate in the research project.

The interview should take approximately 30-60 minutes.

---

**Date:**

**Signature:**

## APPENDICES

### **The Filipino community in the Western Cape, South Africa**

1. How was your community established? (probe)
2. What are the main aims and purpose of your community group? (probe)
3. How many households belong to your community?
  - a. How does one join your community group?
4. What common problems and issues do members of your community face?
5. How would you gauge the Filipino community's social integration with their communities in the Western Cape?

### **II. The Filipino community and their contributions to the Philippines**

1. In what ways do the members of your community, and your community as a whole, contribute to the economic development of the Philippines? (probe)
2. In what ways do the members of your community, and your community as a whole, contribute to the social development of the Philippines? (probe)

### **III. The Filipino community and their role in Philippine-South African relations**

1. As community leaders, how do you see your community's role in contributing to Philippine-South African cooperation? (probe)
2. In what ways can your community further Philippine-South African relations? (probe)
3. What kind of support and resources would you need to mobilize this?
4. Would you be willing to participate in the emerging deal on Philippines-South Africa Cultural Cooperation Agreement?

### **Final comments, suggestions and questions**

Do you have any final words you would like to add?

*Thank you for your time and participation! The findings and the final document will be made available to you should you be interested in reading them.*

# APPENDICES

## APPENDIX D- SEMI-STRUCTURED INTERVIEW SCHEDULE: HONORARY PHILIPPINE CONSUL

### **Semi-structured Interview Schedule:** **Honorary Philippine Consul (Cape Town)**

***Exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries***

#### Introduction

I am Irina Velasco, a Filipino student at the University of Cape Town who is working towards her Master's degree in Social Development. My research project is exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries.

#### Purpose

The purpose of this interview schedule is to gather information that would support the study. In particular, it seeks to uncover data regarding:

- The profile of Filipinos living in the Western Cape
- Their socio-economic contributions to the Philippines and South Africa
- Their potential for contributing to improved Philippine-South African relations

From here, the hope is to recognise the value that the migrant community has in development, as well as uncovering new ways for realising this. Through your valuable insights as Honorary Philippine Consul, we are able to back this up with key perspectives that would deepen the study's significance.

This interview will be recorded to ensure the accuracy of your input.

#### Research ethics

Your valued participation will adhere to the University of Cape Town's Code of Research Ethics. It ensures confidentiality of this interview, as well as regard for your right to privacy and preferences. Kindly express clarifications, comments, and request to discontinue, should they arise at any point in this interview.

Please sign below if you would like to participate in the research project.

The interview should take approximately 30-60 minutes.

---

**Date:**

**Signature:**

## APPENDICES

### **The Filipino community in the Western Cape, South Africa**

1. When was the consulate established in Cape Town?
  - a. What are the key aims, focus, and mandate of the consulate in Cape Town?
  - b. What challenges does the Philippine Consulate in Cape Town face?
2. What data is available in establishing a profile of the Filipino community in Cape Town?
3. How would you gauge the Filipino community's social integration in their communities in the Western Cape?
4. What overriding issues and concerns exist among Filipinos in the Western Cape?

### **II. The Filipino community and their contributions to South Africa**

1. In what ways has the Filipino community in the Western Cape contributed to the development of South Africa's economy?
2. In what ways has the Filipino community in the Western Cape contributed to the development of South Africa socially?

### **III. The Filipino community and their role in Philippine-South African relations**

1. What opportunities exist for them to participate in furthering Philippine-South African cooperation?
2. What channels and venues are available in realising these?
3. What services and resources can the consulate provide?
4. How can they participate in the emerging deal on Philippines-South Africa Cultural Cooperation Agreement?

### **IV. Final comments, suggestions and questions**

Do you have any final words you would like to add?

*Thank you for your time and participation! The findings and the final document will be made available to you should you be interested in reading them.*

# APPENDICES

## APPENDIX E- SEMI-STRUCTURED INTERVIEW SCHEDULE: FOCUS GROUP DISCUSSION

### **Semi-structured Interview Schedule:**

#### **Focus Group Discussion**

*Exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries*

#### Introduction

I am Irina Velasco, a Filipino student at the University of Cape Town who is working towards her Master's degree in Social Development. My research project is exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries.

#### Purpose

In line with the broader goals of this research, the purpose of this brainstorming session is to further build on the insights that you have shared from each of our individual interviews. Particularly, it looks at initiatives that seek to address challenges and mobilize the Filipino diaspora's full development potential.

It is hoped that this group setting would provide a platform for the exchange and synergy of ideas among various members of the Filipino community in the Western Cape.

This interview will be recorded to ensure the accuracy of your input.

#### Research Ethics

Your valued participation will adhere to the University of Cape Town's Code of Research Ethics. It ensures confidentiality of this interview, as well as regard for your right to privacy and preferences. Kindly express clarifications, comments, and request to discontinue, should they arise at any point during this discussion. Identifying details will be removed from the transcription and the same alias as before will be applied accordingly.

Please sign below if you would like to participate in the research project.

The interview should take approximately 90 minutes.

---

**Date:**

**Signature:**

## APPENDICES

### Focus Group Discussion

#### Interview Schedule

***Exploring the socio-economic contributions that Filipinos in the Western Cape make to the development of their home and host countries***

#### **A. Filipino community in Cape Town**

1. What are your thoughts regarding the challenges facing the Filipinos in Cape Town?  
(Unemployment, seafarer welfare, community faction)
2. In what ways could these issues be resolved?
3. How do you think can the Filipino community build bridges amongst themselves?
4. What can the members of this group contribute towards initiatives in bringing the two communities together?
5. Give some suggestions as to the way forward.

#### **B. Philippine-South African relations**

1. What potential areas lie in furthering Philippine-South African relations?  
(Knowledge/skills exchange, trade, cultural cooperation)
2. What initiatives can be undertaken in order to realize this?
3. How do you think will you be able to contribute to this?
4. In what ways can we consolidate people's initiative and capacity to contribute?
5. What challenges do you think might hinder its effectiveness?

#### **Final comments, suggestions and questions**

Do you have any final words you would like to add?

*Thank you for your time and participation! The findings and the final document will be made available to you should you be interested in reading them.*

# APPENDICES

## APPENDIX F- OFFICIAL PHILIPPINE EMBASSY MEMO ON THE BAYANIHAN WORKSHOP

Dasuguan ng Pilipinas



Embassy of the Philippines

**EXTREMELY URGENT**

**MEMORANDUM CIRCULAR NO. PT-15-2012**

TO : Mr. Steven Chaimowitz  
Philippine Honorary Consul  
Cape Town, South Africa

Mr. Mario Desamparado  
President  
Filipino Social Club Cape  
Town (FSCCT)

Ms. Amy Friedrichsen  
President  
Kababayan Filipino Society  
Cape Town (KFSCT)

Cc : Bayanihan SA Cape Town  
**Email:** [bayanihanSAcapetown@gmail.com](mailto:bayanihanSAcapetown@gmail.com)  
[irina.vrlascro@uct.ac.za](mailto:irina.vrlascro@uct.ac.za)

FROM: Philippine Embassy, Pretoria

RE : **Invitation to the Bayanihan Workshop, 25 August 2012**

DATE : 17 August 2012

The Philippine Embassy encloses a letter from the Bayanihan SA Cape Town, an ad-hoc group committed to working for the formation of Filipino Migrant Community Cooperative in Cape Town inviting the Filipino community leaders in the city to a workshop on 25 August 2012 at St. Giles Centre.

This workshop aims to provide a venue in working on a common collective interest in establishing social enterprise and entrepreneurial development among the Filipinos in Cape Town.

The Embassy applauds this endeavour and encourages the support of concerned community leaders in Cape Town by participating in the program and requesting the presence of the members of the community at the event.

We wish this program a great success and we look forward to hearing the outcome of this worthy effort.

Thank you and *Mabuhay!*

**CONSTANCIO R. VINGO, JR.**  
Ambassador



54 Nicolson Street, Muckleneuk, Pretoria  
P.O. Box 2562, Brooklyn Square 0075, Pretoria, South Africa.  
Tel. Number (27-12) 346-0451/2 Fax. (27-12) 346-0454  
E-mail: [pretoriape@mwweb.co.za](mailto:pretoriape@mwweb.co.za)

Official Website: <http://www.pretoriape.org>

## APPENDICES

### APPENDIX G- PERSONAL MEETING WITH THE PHILIPPINE AMBASSADOR TO SOUTH AFRICA

On April 25, 2012, the researcher attended a gathering hosted by one of the Filipino community groups in Cape Town. It was a get-together with Philippine Ambassador to South Africa, Amb. Constancio Vigno Jr., who was in the city for an official trip to the parliament. The researcher had the opportunity to speak with him regarding Philippine-South African affairs.

Philippine foreign policy currently mandates an economic diplomacy approach. This means a focus on soliciting trade as well as attracting investors to the country. It is in line with neoliberal paradigm of facilitating development through a trickle down approach. In the context of the two countries, the automotive industry is among the strongest trade, amounting to 240 million in value.

Of the Filipinos in South Africa, the embassy estimates some 900 people in the country, 200 of which were engineers involved in the Gautrain initiative, while some other 200 are settlers in Cape Town. There is difficulty in ascertaining this given the lack of census. Nonetheless he spoke of how they are mostly organized in loose groupings, with varying degrees of formality in associations.

Non-economic services offered by the Philippine representation include documentation (such as passport renewal) as well as counseling. Trips such as this one was also taken advantage in line with processing of documentation, such as passport renewal.

On the Philippine-South African cultural cooperation, the ambassador mentioned how efforts for this can happen even without the policies in place, however no official project has been launched yet in relation to this.