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**THE MECHANISM OF THE ADAPTATION OF THE INTELLECTUAL  
MIGRANT WITH THE APPLICATION OF LISGAARD'S U-  
CURVEHYPOTHESIS**

**МЕХАНІЗМ АДАПТАЦІЇ ІНТЕЛЕКТУАЛЬНОГО МІГРАНТА ІЗ  
ЗАСТОСУВАННЯМ U-ПОДІБНОЇ КРИВОЇ ЛІСГААРДА**

**МЕХАНИЗМ АДАПТАЦИИ ИНТЕЛЛЕКТУАЛЬНОГО МИГРАНТА С  
ИСПОЛЬЗОВАНИЕМ U-ОБРАЗНОЙ КРИВОЙ ЛИСГААРДА**

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**Abstract.** *The main purposes of the article are to analyze the concept of intellectual migrant, to consider the features of international migration of highly skilled workers, problems and consequences of intellectual migration, to study the factors affecting the migrant in a new environment using the U-shaped Lysgaard curve, to determine the features and causes of migration from Ukraine. The basic migration directions of the Ukrainian students for study and outflow of highly qualified personnel abroad are considered in the article. The main directions and centers of migrant flows in the world are analyzed.*

**Key words:** *intellectual migrant, international migration, "brain drain", U-shaped Lysgaard curve, culture shock, "push-pull" theory.*

**Анотація.** *Головною метою статті є аналіз поняття інтелектуального мігранта, аналіз особливостей міжнародної міграції висококваліфікованих працівників, проблем та наслідків інтелектуальної міграції, дослідження чинників, які впливають на стан мігранта у новому для нього навколишньому середовищі за допомогою U-подібної кривої Лісгаарда, визначення особливості та причини інтелектуальної міграції з України. Розглянуто основні напрямки виїзду українських студентів на навчання та відтоку висококваліфікованих кадрів за кордон в пошуках роботи. Проаналізовано основні напрями та центри тяжіння мігрантів у світі.*

**Ключові слова:** *інтелектуальний мігрант, міжнародна міграція, «відтік інтелекту», U-подібна крива Лісгаарда, культурний шок, теорія «притягування - виштовхування».*

**Аннотация.** *Главной целью статьи является анализ понятия интеллектуального мигранта, рассмотрение особенностей международной миграции высококвалифицированных работников, проблем и последствий интеллектуальной миграции, исследования факторов, влияющих на состояние мигранта в новой для него окружающей среде с помощью U-образной кривой Лисгаарда, определение особенностей и причин интеллектуальной миграции из Украины. Рассмотрены основные направления выезда украинских студентов на обучение и оттока высококвалифицированных кадров за границу в поисках работы. Проанализированы основные направления и центры притяжения мигрантов в мире.*

**Ключевые слова:** *интеллектуальный мигрант, международная миграция, «утечка мозгов», U-образная кривая Лисгаарда, культурный шок, теория «притяжения - выталкивания».*

**Introduction.** International migration has become one of the most debated topics in many developed and developing countries. Host countries are concerned about the socio-economic impact of international migration, while donor countries are concerned about the outflow and loss of highly skilled workers. At the end of XX century, the number of migrants has increased drastically. The

openness of developed societies and the loyal migration policies of the centers of immigration have played a significant role in this process. "Brain drain" is defined as the migration of highly skilled workers in search of a better level of living, access to advanced technologies, more stable economic and political conditions. Some have next questions: "Why do talented people leave their countries and go abroad? What are the consequences of such a migration? What policies can be applied to deter migration from developing countries to developed countries?"

**The purpose of the study** is to analyze the main reasons and factors of migration of highly qualified personnel, to determine the nature of international intellectual migration, to identify possible consequences, and especially - losses for donor countries of intellectual resources, to study the migrants during adaptation in a new country using the U-shaped Lysgaard curve.

**Recent literature review.** The study and analysis of international migration of highly skilled workers has received a great deal of attention from foreign scientists, including Oberg K. [*Oberg, 1954*], Dustman K., Lysgaard S. [*Lysgaard, 1955*], Black S., Mendenhall M. [*Black, Mendenhall, 1991*], Todaro M., Phillips K., Williams A., Iredale R. Important contributions to the study of international migration have been made by domestic scientists and young scientists, such as Medina T., Pendyur N. [*Medina, Pendyur, 2014*], Gaidutsky A., Grabinsky I., Erfan Y. [*Erfan, 2018*], Zhurakovskaya L., Romanyuk M. [*Romanyuk, 1999*], Stupnitsky O., Telephanko N. [*Telefanko, 2011*], Filipenko A. At the same time, there are relatively few publications in the national literature, which cover the theoretical and methodological foundations of international migration, namely the state of a migrants when they move and stay in a new country - this is main idea that helps us to choose the research topic and its relevance. The methodological basis of the study was documents, analytical data and statistics from the United Nations (UN), the State Statistics Service of Ukraine, the International Organization for Migration (IOM), the International Labor Organization (ILO) and others.

**The main results of the research.** Intellectual migration is a phenomenon of human society that is justified in the constant changes of intellectual centers. It is based on such personal motives of the intellectual, as his desire for scientific achievements, his preference and adaptation to another culture and the way of life, belonging to certain ethnic groups and social classes. The migrant can also be governed by political and social conditions, such as the level of liberalism and working conditions in his country and country of residence. The concept of "brain drain" appeared in 1962 in the text of a report by the British Royal Society. It was used to describe the emigration of researchers, engineers and technical staff from the UK to the USA [*Parhomenko, 2014: 37*].

The experience of highly developed countries shows that effective recruitment and usage of skilled labor is one of the key factors for a country's economic growth. Instead, the migration of low-skilled workers, who are not deficient in the economy of the country, leads to the growth of unemployment among the local population, lower wages in the industry and increased social tensions [*Ligvishchuk, 2018: 9*]. The multifactorial impact of migration on the socio-economic status of the country requires a continuous improvement of the system of regulation of international labor migration in order to obtain socio-economic benefits from state participation in migration processes.

From the perspective of developing countries, this phenomenon can even be seen as a problem; countries want their intellectuals traveling abroad to return and help in the development of the country. However, real opportunities and incentives do not always exist. Therefore, administrative and legal measures can be developed both in the country of birth of the migrant and in the host countries.

In terms of international exchange, the phenomenon of migration of intellectuals can in some cases be considered not only normal but also highly desirable. Migration of intellectuals is also a positive factor in the cross-fertilization of cultures. It should also be noted that in today's world, intellectual migration is caused by processes occurring not in science, but in society in

general: a crisis of economic, social, political and cultural relations. At the same time, many countries are interested in getting qualified specialists due to lack of their own high-level specialists [Medina, Pendyur, 2014: 150-157].

Knowledge centers have always been a pole of attraction for those who, for some reasons have strived to learn. Today, intellectual migration or as it is called "brain drain" is a constant phenomenon in the development of man and his society. The migration of skilled workers should not be seen, as a single case of modern world social evolution, but a continuing historical process. Even Aristotle himself was an intellectual migrant for Macedonia.

However, we must differentiate the meaning of "migration" in our study. Our concern here is not simple migration. Almost every migrant has an occupation but is not necessarily an intellectual. The metropolis offers more opportunities and therefore has the power of attractiveness. Movement can be from a village to a city or from one country to another. In the context of the article, we want to consider the part of international migration that covers highly qualified persons. For example, a nurse who does not find a suitable job at a hospital in her home country goes abroad. Despite her skills and intellectual abilities, she is not classified as an intellectual, so, she can migrate despite the existing need for nurses that she does not fill.

In our work we want to highlight intellectual migration as a migrant's leadership in any field. For the purposes of this study, we are only interested in the phenomenon of migration when a highly qualified person migrates to one country and definitely stays there. Thus, we are not concerned worry with foreign students who return home after studying. But the next question immediately arises: "At what point does specialty education end?". Surely a doctor or engineer would be much more useful to his country when he/she returned not only with a theoretical background but also with good practical skills and experience. This, of course, complicates the identification of the subject of study. Here again choosing the term "migration" can help delineate the topic. This includes in the first instance the "intention" to stay. Of course, this intention should be taken into account after a period of adaptation and real material capacity. From the point of view of the U-shaped Lysgaard curve, intentions may be materialized at the end of the curve rather than at the beginning of it [Mizuno, 2012: 9]. An adaptation model was proposed by Lysgaard, according to which the adaptation overcomes three main phases. At the beginning of a stay in a new country a foreign student goes through a process of interest to the society and culture, which is positively reflected in its general state; the second period is depression, crisis; and the third is a positive transition to the adaptation period and the final adjustment. The presented analysis of the results of the survey confirmed that adaptation to the new culture takes place according to the U-shaped curve (Fig. 1).

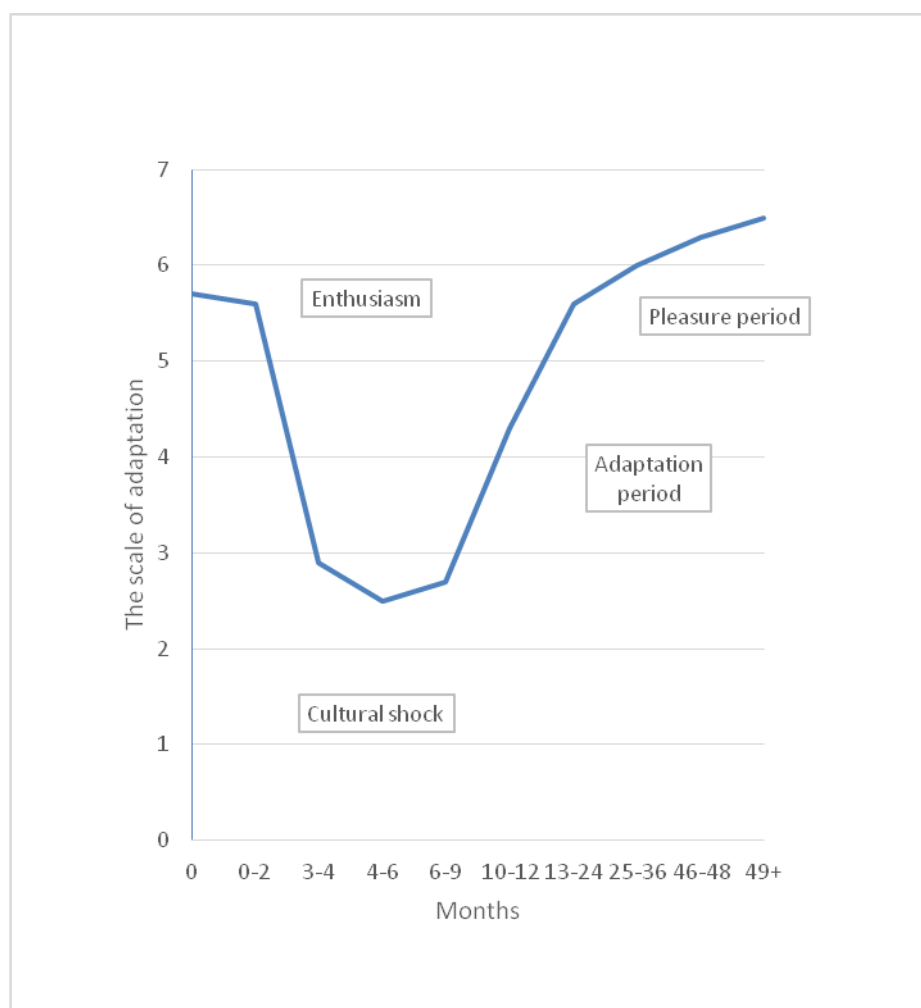


Fig. 1 U-shaped curve of an intellectual migrant's adaptation

Social adaptation is the process and result of an active adaptation of an individual to the conditions of a new or changed social environment through the harmonization of the requirements and expectations of its participants [Gorodyanenko, 2008: 14].

According to K. Oberg, the entry of a foreign student into a new society, getting acquainted with a new culture can lead to a culture shock accompanied by the unpleasant feelings of joining a new society, in addition the loss of communication with friends and family, a certain status, rejection, astonishment and discomfort differences between cultures [Stefanenko, 1999: 160]. The term "cultural shock" was introduced into scientific circulation by the anthropologist K. Oberg in 1954 [Oberg, 1954: 1]. "Cultural shock," he noted, "is the result of anxiety resulting from the loss of all common signs and symbols of social interaction". Subsequently, most scholars adhered to K. Oberg's approach, extending this definition. Traditionally, "cultural shock" refers to the reaction of anxiety to an unfamiliar environment because of the inability to understand, control and predict other people's behavior.

Proponents of the concept of "culture shock" believe that the process of adaptation to the new culture is in accordance with the U-shaped curve. Researcher S. Lysgaard emphasizes that adaptation of one who is temporarily in another country, looks like the U-shaped curve, that shows at first the satisfaction and well-being gradually decrease, but then increase again. In other words, migrants, when adapting to a new culture, go through three phases: the first is characterized by enthusiasm and high spirits; the second - frustration, depression and feeling of anxiety (actually a "culture shock"); in the third phase, these feelings turn into confidence and satisfaction. Also, scientists highlight another stage - the adaptation period, looking at the graph of the U-shaped adaptation curve of the intellectual migrant (Figure 1), you can see that it is between a culture shock and a period of complete pleasure. Thus, culture shock arises primarily in the emotional sphere of

the individual, but social factors such as maladaptation and rejection of new morals, style of behavior and communication, etc. [Lysgaard, 1955: 45].

Migrants have introduced various technologies to help themselves in the process of cultural adaptation and cultivation. In recent years, the most common and useful methods used by newcomers are social media, which play a key role in connecting people around the world to share the knowledge and cultural traditions. In fact, the world has become a "big village" after the emergence of social media programs. Therefore, people can interact and communicate with each other using the Internet, they can also receive information about the new society. Thus, thanks to social media, people from every culture can understand and respect the traditions and norms of other countries. The term "intercultural adaptation" means the adaptation of different behaviors, that is, to reduce the likelihood of being misunderstood while talking and communicating with a person of another culture [Gudykunst, 2003: 34]. In the process of intercultural adaptation, people use social media for several purposes, for example, to learn about other cultures and countries, to establish relationships with friends and family, and constantly be informed. In other words, interaction and communication over the Internet are influencing intercultural adaptation for newcomers to host countries.

The experience of people who have successfully switched from one culture and "merged" with another has enriched the multicultural world. That is, the term intercultural adaptation signifies this situation: after a person enters a new culture, he/she may initially be in a state of disequilibrium, but after a while he/she will find a balance [Kim, 2001]. It is natural to be in this state, because one does not know enough about the new culture. Adaptation to a new culture is a dynamic process by which people, moving to an unfamiliar cultural environment, establish (or restore) and maintain a relatively stable, reciprocal and functional connection with the environment [Gudykunst, 2003: 224].

Adapting to a new culture involves experiencing many factors in adaptation processes, such as behavioral and psychological changes, as people from different cultures interact in different ways [Kim, 2005]. According to Lee and Kim [Lee, Kim, 2012], people need to apply adaptive skills and learn about new culture while engaging within the target culture. This process involves a clear awareness of one's culture and new cultures in terms of differences and similarities. For example, being an interesting and open person to cultural differences helps to develop intercultural competence. Moreover, communication is important in this intercultural process, communicating with people in a new culture is very beneficial to overcome barriers and gradually adapt to the new culture. With regard to psychological factors, emotions have a significant impact on the process of cultural adjustment. According to Matsumoto, Hiraiyama and LeRoux [Matsumoto, Hirayama, LeRoux, 2006], people who cannot control their emotions may have difficulty in successful adaptation to new cultures. Therefore, people need to control their emotions to seamlessly and easily adapt to the new culture.

Currently, Facebook is the most popular application among social networks such as YouTube, Twitter and more. Mark Zuckerberg created Facebook in 2004 to encourage interaction between people from different cultures around the world. As of the second quarter of 2019, Facebook is the largest social network in the world, with an active user count of 2.41 billion (Figure 2). In the third quarter of 2012, the number of active Facebook users exceeded one billion, making it the first social network to ever do so. People use Facebook to stay in touch with friends and family, to find out what's going on in the world and to share important information.

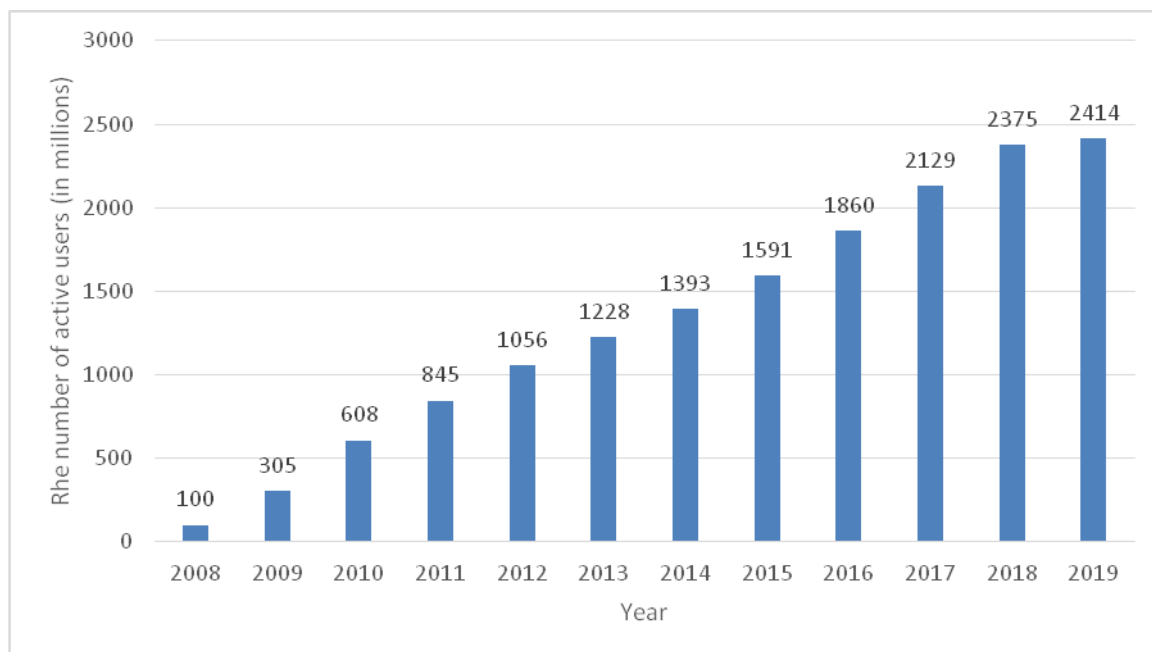


Fig. 2. Number of monthly active Facebook users worldwide as of Q2 2019 (in millions)

Does the material well-being affect on the decision of an intellectual to remain in developed countries or not? Better salary, access to cultural events, effective organization of society, real possibilities for using modern devices are all components that are considered by a scientist who has decided to stay in the country of residence. The largest extent of international labor migration is determined by differences in salaries. The official minimum wage in Ukraine is only UAH 4173 [Minfin, 2019a], or \$ 167 [Minfin, 2019b]. This makes neighboring countries like Poland more attractive option for employment of Ukrainians (Fig. 3).

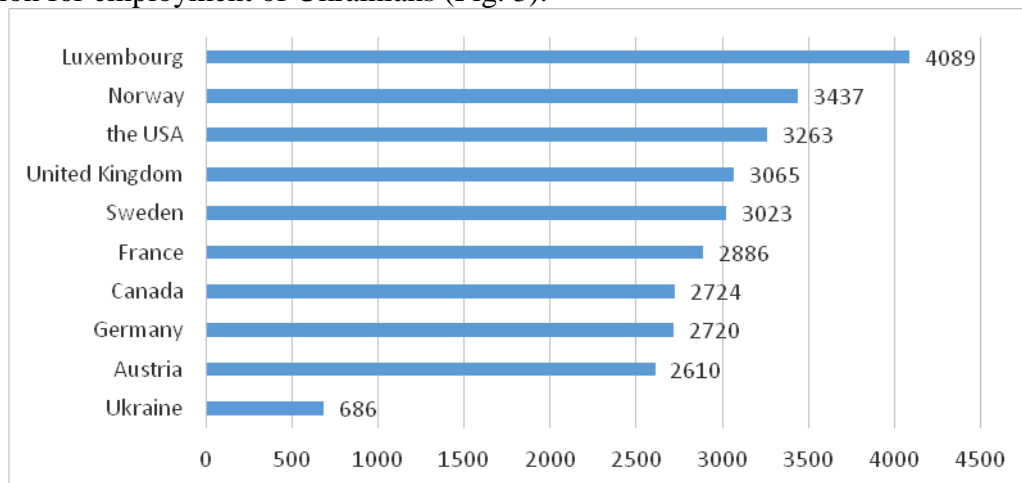


Fig. 3. Countries with the highest average wages and Ukraine's place in this ranking

Thus, according to the Ukrainian Delegation of the International Organization for Migration, Luxembourg was ranked first with an average salary of \$ 4,089, and Ukraine ranked fifty-sixth (\$ 686). I want to point out that this is the average, not the minimum wage [International Organization for Migration, 2018].

Contemporary international intellectual migration is conventionally made up of two parts: highly skilled professionals moving from one developed country to another (mainly within Europe) and specialists traveling from Asia, Africa, Latin America and Eastern Europe. Developing countries (Ukraine can be safely attributed to this group), due to the migration of highly skilled workers, have major complications due to a lack of highly qualified staff. This is why "brain drain" was considered as the migration of highly skilled and talented professionals from poor and / or isolated countries to industrial centers. This process is ongoing and constantly gaining momentum,

increasing the annual number of skilled migrants to EU countries and especially to the United States [Parhomenko, 2014: 37].

Considering the factors that stimulate emigration, most researchers rely on the “push-pull” theory, developed by English scientist Ernst Ravenstein, who was one of the first to begin to study migration processes [Romanyuk, 1999: 79-83]. Based on census data in England and Wales, he formulated the "Laws of Migration" in 1889. Ravenstein concluded that population migration can be explained by the effect of “push-pull” factors: unfavorable conditions in one area (rigid legislation, excessive taxes, etc.) "push" people out of their place of residence and favorable conditions created in others territories “pull” them. Accordingly, he divided all the factors that cause migration into internal (“push” factors) and external (“pull” factors). For example, for migrants from developing countries, a leading “push” factor in intellectual sphere is the elementary lack of a real sphere of intellectual labor, the isolation of some scientists, the inability to develop as a scientist in a normal way. For example, the USSR held 25% of the world's scientific potential. This has largely given it the status of a "superpower". In the early 1990s, countries of the former Soviet Union have experienced an extremely complex crisis in the collapse of the intellectual community due to the destruction of a unified system of development of research institutions.

Further development of Ravenstein's theory of migration was acquired in the works of E. Lee, who believed that the greatest influence on population migration is exerted by internal or external factors. In addition, Lee found that factors such as distance, physical and political barriers could not only deter but also prevent migration [Kovalik, 2012: 117]. All “push-pull” factors can be conditionally divided into 5 groups, namely: social, political, economic, environmental and cultural (Table 1).

Table 1.

**Factors of influence on international migration**

<b>“Push” factors</b>	<b>“Pull” factors</b>
Social	
Poor quality of education Poor working conditions Low level of health care Lack of self-realization	High quality of education Good working conditions Affordable and high level of health care Possibility of self-realization
Political	
Corruption Political instability	No corruption Stable political system
Economic	
Low wages Poor quality of life High unemployment rate Economic instability	High level of wages High quality of life Low unemployment Stable economy
Ecological	
Contaminated environment Poor quality of drinking water and food	Cleaner environment High quality drinking water and environmentally friendly food
Cultural	
Religious persecution Racism	Freedom of religion No racial discrimination

Source: constructed by authors based on [Kovalik, 2012: 118].

In Ukraine, migration processes are characterized by dynamism, diverse and complex causes not only internally scientific but also social and economic. In recent decades, researchers who have been unable to adapt to the new socio-economic conditions of post-Soviet Ukraine and have not been able to "stay in science" have shifted to other areas of human activity, such as business. This, in turn, has led to imbalances in the scientific and educational spheres, and has created new



challenges and threats to national educational and scientific sectors that affect the level of technical and technological development of Ukraine.

The consequences of migrating researchers are a significant problem for developing countries. After all, considerable funds were invested in the training of specialists, creating a competitive advantage for other countries, that is, the country does not receive a return on its own investment in human capital. Benefits from the migration of scientific personnel can only be realized when the donor country creates an effective policy for the circulation of highly skilled personnel [Howak, 2013: 29]. On the example of Ukraine, it can be argued that there is no state support for migrant scientists in the country, who, on their return, face psychological stress, and migrants have to go to work in other countries.

Among the main reasons for the migration of highly skilled workers can be identified [Malinowska, 2010: 48; Telefanko, 2011: 35; Malyutin, 2008: 101]:

1. insufficient funding for the scientific field;
2. low wages;
3. imperfect infrastructure and inefficient institutional support that makes it impossible to implement scientific developments;
4. unstable economic and political situation;
5. lack of prospects for professional realization [Tkach, 2005: 101].

The high concentration of these causes of migration makes it possible to identify centers of attraction for migrants from other countries. At present, the centers that attract the bulk of the workforce, including highly skilled workers, are:

- Western European countries (Germany, France, the United Kingdom, Switzerland, Belgium, Sweden, the Netherlands), where there is a tendency to use foreign labor for heavy, harmful works,
- The United States, Canada and Australia, which host predominantly qualified specialists,
- industrial countries of Southeast Asia,
- Middle East oil producing countries.

**Conclusions.** Thus, intellectual migration as a contradictory and ambiguous phenomenon requires concrete measures for its regulation, which should be carried out by means of international legal regulation of migration processes taking into account the global interests of the world community, the objective capabilities of individual states and the peculiarities of population development [Erfan, 2018: 10].

Not only nuclear scientists or biochemists move to more developed countries with well-equipped research laboratories, but also sociologists, international lawyers and people with similar professions migrate to academic centers where ideas are exchanged, with a well-equipped library and a free access to publications and articles. From the point of view of physics, the migrant's brain is constantly pierced and fed by a wealth of knowledge, and upon returning home, he/she will have to make a special effort to stay fit. An intellectual from a developed country with limited resources migrates either in order to have access to more sophisticated equipment or because his country does not offer professional satisfaction and interesting opportunities. It should be noted that this movement should be understood as a flow from European countries to the USA in the field of applied sciences and technologies. In the field of humanities and fine arts, the movement is bilateral and even more from developed countries outside Europe, such as Australia, New Zealand, Canada and even the United States to Europe. Therefore, intellectual migration is a complex phenomenon that has an ambiguous impact on the socio-economic development of donor and recipient countries.

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