

## The Myth of the “New Phoenicians”: Are Lebanese People Really Cosmopolitan?\*

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### Abstract

Most previous studies have assumed the following hypothesis: the Lebanese diaspora continues to have strong attachments to the homeland based on close networks of personal connections, and almost all Lebanese have a strong interest in foreign countries through such networks. That is why the Lebanese have come to be commonly known as the “New Phoenicians.” Furthermore, the large amount of remittances from the Lebanese diaspora has been pointed out by almost all previous studies as clear evidence of such networks. The BCRI’s “Middle East Opinion Poll (Lebanon 2010)” and the “Middle East Opinion Poll (Lebanon 2012),” conducted in collaboration with our Japanese research team, however, presented a serious challenge to the common belief. Thus, we conclude that the widespread image of the Lebanese as “New Phoenicians” represents only a small segment of society; in contrast, the majority of middle- or low-income Lebanese do not receive any benefit from such global networks.

Keywords: Lebanon, Lebanese Diaspora, Migration, Economic Polarization, Opinion Poll

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## 1. Introduction

Some widespread stereotypes have been formulated about the Lebanese people: for example, they are considered to be cosmopolitan, multilingual, business-oriented, and to possess an entrepreneurial spirit and global networks. As a result, the Lebanese have commonly been referred to as the “New Phoenicians,” or a typical case of “Trade Diaspora.” According to Robin Cohen, between the seventeenth and the twentieth century, a huge number of Lebanese who were motivated by positive ambitions (such as achieving wealth) rather than negative ambitions (such as escaping from persecution or the civil war) immigrated to the Mediterranean region, West Africa, or the North and South American continents. Even today, Lebanese emigrants frequently communicate with their original homeland, Cohen argues.<sup>1</sup> Similarly, Salim Nasr maintains that, “A land of old migration and emigration, a major receiver and sender, contemporary Lebanon has been both at the heart of one of the first global diaspora and the objective of many in the region who aspired to and moved to become part of it.”<sup>2</sup> In sum, hitherto, conventional wisdom has it that the Lebanese diaspora continues to have strong attachments to the homeland based on close networks of personal connections. Almost all Lebanese have a strong interest in foreign countries through such networks: that is why the Lebanese have come to be known as the “New Phoenicians.”

This perspective is strengthened by the media reports that some prominent foreign figures of Lebanese origin occasionally come back to their homeland and engage in talks with Lebanese politicians or other prominent figures. The best examples are Carlos Slim Helú, a Mexican business magnate and philanthropist who is currently ranked as the richest person in the world (2012); Carlos Ghosn, a Brazilian-born businessman who is currently the Chairman and CEO of Japan-based Nissan (both are Lebanese-origin Maronite Christians); and Nicolas George Hayek, a Swiss-Lebanese American

<sup>1</sup> Robin Cohen, *Global Diasporas: An Introduction*, 2nd ed. (London: Routledge, 2008).

<sup>2</sup> Salim Nasr, “The New Social Map,” in Theodor Hanf and Nawaf Salam, eds., *Lebanon in Limbo: Postwar Society and State in an Uncertain Regional Environment* (Baden-Baden: Nomos Verlagsgesellschaft, 2003), p. 145.



entrepreneur, co-founder, CEO and Chairman of the Board of the Swatch Group (Lebanese-origin Greek Orthodox Christian). On such occasions, these figures always emphasize a strong relationship between the Lebanese diaspora and the homeland.<sup>3</sup>

However, do such widespread stereotypes of the Lebanese really reflect Lebanese society as a whole? Do the close human networks that have been postulated both inside and outside of Lebanon actually reflect the reality in Lebanon? Is the stereotyped image of “New Phoenicians” truly representative of the majority of Lebanese people?

Based on an awareness of these questions, we reconsider the experiences and perceptions of Lebanese people living in Lebanon with respect to their cross-border movements and try to obtain a more precise picture of the human networks of the Lebanese diaspora and the homeland. To this end, we took original data sets: the “Middle East Opinion Poll (Lebanon 2010)” and “Middle East Opinion Poll (Lebanon 2012)”<sup>4</sup> were both conducted by the Beirut Center for Research and Information (Markaz Bayrut li-l-Abhath wa al-Ma‘lumat; “BCRI”)<sup>5</sup> in collaboration with our Japanese research team<sup>6</sup> in

<sup>3</sup> Helú arrived in Beirut in March 2010. He met with President Michel Sleiman at the Presidential Palace in Baabda and received Lebanon’s honorary golden medal. According to a statement from Baabda Palace, Helu discussed possible investment projects in Lebanon with Sleiman. The president expressed his wish to reinforce ties between Lebanon and the Lebanese diaspora, especially with Lebanese expatriates who had become leading businesspeople or had occupied political or economic positions. For more information, see his website ([http://www.carlosslim.com/reconocimiento\\_beirut\\_ing.html](http://www.carlosslim.com/reconocimiento_beirut_ing.html)).

<sup>4</sup> Hiroyuki Aoyama, Masaki Mizobuchi, Shingo Hamanaka, Yutaka Takaoka and Dai Yamao, “Middle East Opinion Poll (Lebanon 2010),” Fact Sheet (Tokyo: Tokyo University, 2010); Aoyama, Mizobuchi, Hamanaka, Takaoka and Yamao, “Middle East Opinion Poll (Lebanon 2012),” Fact Sheet (Tokyo: Tokyo University of Foreign Affairs, 2012). Both datasets are freely available from our website: <http://www.tufs.ac.jp/ts/personal/aljabal/namatiya/research/lebanon2010/03.pdf>; <http://www.tufs.ac.jp/ts/personal/aljabal/namatiya2/research/lebanon2012/03.pdf>.

<sup>5</sup> For further information about BCRI, see: <http://www.beirutcenter.info/>.

<sup>6</sup> This Japanese team includes the following members: Hiroyuki Aoyama, Professor, Institute of Global Studies, Tokyo University of Foreign Studies; Shingo Hamanaka, Associate Professor of Comparative Politics, Department of Systems Science and Information Studies, Yamagata University; Dai Yamao, Lecturer, Graduate School of Social and Cultural Studies, Kyushu University, and the authors. In addition, both opinion polls were carried out with grant-in-aid for



May–June 2010 and July 2012.

The remainder of this article is organized as follows. Section 2 reviews previous studies of the Lebanese diaspora and its relationship with the homeland, and derives several hypotheses from it. Section 3 summarizes our most recent study, which is based on the “Middle East Opinion Poll (Lebanon 2010),” and through this work, we criticize previous studies and raise a new hypothesis.<sup>7</sup> Section 4 reconsiders some problems intrinsic in our last opinion poll and study and describes some points of modification in our second opinion poll. Finally, we state future prospects for this area of study.

## 2. Lebanese Diaspora and Homeland Relations

### 2.1 A Brief History of Lebanese Migrants/Diaspora

The history of the Lebanese cross-border movements dates back to the seventeenth century.<sup>8</sup> At that time, Lebanon as a modern nation state did not exist yet; it was a political subdivision of Syria under the Ottoman Empire. The Lebanese people’s migrations extended to a wide area including the United States, Europe, South America, Australia, and West Africa. However, from the seventeenth century to the early nineteenth century, the number of emigrants was still small. The massive wave of migrations from Lebanon did not begin until the late nineteenth century.

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<sup>7</sup> Yutaka Takaoka, Shingo Hamanaka and Masaki Mizobuchi, “Experiences and Perceptions of the Lebanese toward Cross-Border Movements: Rethinking the Image of ‘New Phoenicians,’” *Annals of Japan Association for Middle East Studies*, Vol. 28, No. 1 (June 2012), pp. 35–58. (In Japanese.)

<sup>8</sup> For more details on the historical trend of emigration from Lebanon, see Albert Hourani and Nidim Shehadi, eds., *The Lebanese in the World: A Century of Emigration* (London: I. B. Tauris, 1992). See also Jihad Nasri al-‘Aql, *al-Hijra al-Haditha min Lubnan wa Ta’ati al-Mu’assasa al-Rasmiya wa al-Ahliya ma’a-ha, 1860-2000* (Beirut: Darwa Maktaba al-Turath al-Adabi, 2002); Paul Tabar, “Immigration and Human Development: Evidence from Lebanon,” United Nations Development Programme, Human Development Reports, Research Paper (August 2009).



According to Charles Issawi, migration from Lebanon grew sharply from the second half of the nineteenth century to the outbreak of World War I.<sup>9</sup> There are some background factors worth mentioning with respect to the increase in the number of Lebanese migrants: the civil war from 1840–1860; the rapidly expanding population in Mount Lebanon; the emergence of the middle class; and the relative decline of the silk industry, which was a major industry in Mount Lebanon in this period. On average, according to Boutros Labaki and Khalil Abu Rujayli, the number of people who left Mount Lebanon amounted to 3,000 persons per year between 1860 and 1900, and rose drastically to 15,000 per year between 1900 and 1914. Before World War I erupted, it was estimated that a third of the Mountain population left their homeland.<sup>10</sup>

On the other hand, between the two World Wars and the 1950s, emigration flows from Lebanon began to shrink. Again, according to the data of Labaki and Rujayli, the annual number of migrants averaged around 3,000 in the period from 1945 to 1960.<sup>11</sup> However, the number of migrants rose again during the period between 1960 and 1974, being estimated at 9,000 annually between 1960 and 1970, and increased to 10,000 from 1970 to 1975.<sup>12</sup> In addition, in this period, the proportion of Muslims among the migrants from Lebanon gradually increased.<sup>13</sup> In the 1960s, the oil-rich Arab Gulf countries

<sup>9</sup> Charles Issawi, “The Historical Background of Lebanese Emigration: 1800-1914,” in Albert Hourani and Nidim Shehadi, eds., *The Lebanese in the World: A Century of Emigration* (London: I. B. Tauris, 1992), pp. 22–23.

<sup>10</sup> Boutros Labaki and Khalil Abu Rujayli, *Jarda Hisab al-Hurub min Ajl al-Akharin ‘alā Ard Lubnan, 1975-1990* (Beirut: n.s., 2005), p. 59.

<sup>11</sup> Boutros Labaki, “Lebanese Emigration during the War (1975-1989),” in Albert Hourani and Nidim Shehadi, eds., *The Lebanese in the World: A Century of Emigration* (London: I. B. Tauris, 1992), p. 605; Labaki and Rujayli, *Jarda Hisab al-Hurub*, p. 59.

<sup>12</sup> Labaki, “Lebanese Emigration during the War (1975-1989),” pp. 605–606; Labaki and Rujayli, *Jarda Hisab al-Hurub*, p. 59.

<sup>13</sup> Alixa Naff, “Lebanese Immigration into the United State: 1880 to Present,” in Albert Hourani and Nidim Shehadi, eds., *The Lebanese in the World: A Century of Emigration* (London: I. B. Tauris, 1992), p. 142.



emerged as the preferred destinations.<sup>14</sup>

The 15-year-long civil war that broke out in 1975 and the Israeli invasions of Lebanon in 1978 and 1982 sharply accelerated the migration flow from Lebanon. Between 1975 and 1989, it is estimated that 990,000 people left the country, accounting for 40% of its total population. Meanwhile, large numbers were recorded in the post-war period, especially during the period of Syrian hegemony over Lebanon (1990-2005). According to a survey carried out by Choghig Kasparian and St. Joseph University in 2007, the number of Lebanese migrants between 1992 and 2007 is estimated at 466,019, for an annual average of around 30,000.<sup>15</sup>

Furthermore, as in the Jewish diaspora, Lebanese migrants have established migrant communities in each country. A number of Lebanese-origin business people and merchants settled abroad, who speak various languages and are skillful in conducting business, and they were able to amass large fortunes. Most notable are the aforementioned businessmen, Carlos Slim Helú, Carlos Ghosn, and Nicolas George Hayek, who are Christians with origins in Lebanon.

In this way, Lebanese migrants were often economically and politically outstanding figures in each area, which has inspired a number of studies on Lebanese migrants and the diaspora. It is noteworthy that these studies have placed particular emphasis on the strong connections between the Lebanese diaspora and the homeland. The studies insist that the Lebanese diaspora continues to have strong attachments to its homeland based on close human networks, and that almost all Lebanese have a strong interest in foreign countries through such human networks. As mentioned above, “New Phoenicians” is an analogy for the modern Lebanese derived from these arguments.

<sup>14</sup> Marwan Maaouia, “Lebanese Emigration to the Gulf and Saudi Arabia,” in Albert Hourani and Nidim Shehadi, eds., *The Lebanese in the World: A Century of Emigration* (London: I. B. Tauris, 1992), p. 656.

<sup>15</sup> Quoted in Anna Di Bartolomeo, Tamirace Fakhoury and Delphine Perrin, “Migration Profile: Lebanon,” CARIM: Consortium for Applied Research on International Migration (European University Institute, January 2010).



## 2.2 The Lebanese Diaspora and its Relationship to the Homeland

Robin Cohen, for example, maintains that the Lebanese diaspora is a typical case of “Trade Diaspora.” According to Cohen, “The Lebanese trade diaspora comprised two initially distinct groups, merchants and laborers,” and he insists, quoting Kohei Hasimoto’s argument,<sup>16</sup> that “People leave Beirut and the villages, then return from abroad, only to depart again not too long later.”<sup>17</sup> Cohen then asks, “What draws the Lebanese overseas back to Lebanon from such far-flung destinations?” and explains that “One important explanation is the extraordinary hold the imagined homeland has over the diaspora, despite bitter ethnic conflict, civil war, Syrian domination and Israeli invasions, the latest in 2006.”<sup>18</sup>

Likewise, Guita Hourani emphasizes the close networks of personal contacts between Lebanese migrants and their homeland for several reasons: remittances from the Lebanese migrants equal a huge sum of money; Lebanese migrants frequently make trips between Lebanon and their present countries; Lebanese migrants invest in certain kinds of businesses and make vast philanthropic investments in Lebanon.<sup>19</sup> Based on this evidence, Hourani maintains the following:

It is almost an uncontested truth that every Lebanese household has been touched by migration, be it a family member, a relative, or a friend...Lebanese migrants have maintained pulsating networks with each other and with their homeland. Their memory and vision of the homeland further stirred by visits or news and their commitment to restoring Lebanon to its old glory has driven them to maintain and nurture a continuing relationship with the homeland...Whether

<sup>16</sup> Kohei Hashimoto, “Lebanese Population Movements, 1920-1939: Towards a Study,” in Albert Hourani and Nidim Shehadi, eds., *The Lebanese in the World: A Century of Emigration* (London: I. B. Tauris, 1992).

<sup>17</sup> Cohen, *Global Diasporas*, p. 91, p. 94.

<sup>18</sup> Cohen, *Global Diasporas*, p. 94.

<sup>19</sup> Guita Hourani, “Lebanese Diaspora and Homeland Relations,” Paper presented at the Migration and Refugee Movements in the Middle East and North Eastern Africa, The Forced Migration & Refugee Studies Program of the American University in Cairo (Cairo: American University in Cairo, October 23–25, 2007).



individually or collectively, Lebanese migrants have always created solidarity with Lebanon and maintained it.<sup>20</sup>

In this way, most previous studies have emphasized that, whether individually or collectively, Lebanese migrants have always created solidarity and close human networks with their original country. To maintain this solidarity, diasporic communities “preserve regular contacts with their homelands... create elaborate networks that permit and encourage exchanges of money, political support and cultural influence with their homelands and other segments of the diaspora whenever these exist.”<sup>21</sup> In addition, many other works underscored the importance of the networks of personal connections between migrants and their original countries.<sup>22</sup>

Dalia Abdelhady’s recent work is a little more nuanced. Abdelhady has conducted anthropological fieldwork in Lebanese diasporic communities in Montreal, New York, and Paris, and has gathered valuable testimonies from many Lebanese migrants. Regarding these testimonies, Abdelhady states that, “The desire to return was rarely mentioned [by Lebanese migrants] ... as political and social condition[s] in Lebanon continue to be unfavorable. In a global world, the myth of return is no longer meaningful, even as a rhetorical device, since moving back and forth is relatively easy.”<sup>23</sup> She continues:

Lebanese immigrants sustain their social and political engagement with the homeland and maintain relations with family and friends in Lebanon... Religious, social, and cultural practices allow them to continue identifying with the homeland. Cultural activities (such as exhibitions, lectures, seminars, and festivals) are popular strategies for maintaining a connection to the homeland. The immigrants’ philanthropic activities are also aimed at increasing public awareness of Lebanese

<sup>20</sup> Hourani, “Lebanese Diaspora and Homeland Relations,” p. 3.

<sup>21</sup> Gabi Sheffer, “Middle Eastern Diasporas: Introduction and Readings,” *Middle East Review of International Affairs*, Vol. 1, No. 2 (1997).

<sup>22</sup> See, e.g., Sara Johansson de Silva and Carlos Silva-Jauregui, “Migration and Trade in MENA: Problem or Solution?” World Bank, Middle East and North Africa Working Paper Series, No.40 (October 2004); Tabar, “Immigration and Human Development.”

<sup>23</sup> Dalia Abdelhady, *The Lebanese Diaspora: The Arab Immigrant Experience in Montreal, New York, and Paris* (New York: New York University Press, 2010), p. 177.



issues as well as providing material assistance to certain groups in Lebanon that are in need. Interest in the homeland has distinct meanings for the different immigrants. In some instances, maintaining continuous communication with family and friends still in Lebanon or staying informed about political, social, or cultural events in Lebanon are common strategies that shape transnational attachments.<sup>24</sup>

To summarize this point, most of the previous studies have assumed the following hypothesis: the Lebanese diaspora continues to have strong attachments to the homeland based on close networks of personal connections, and almost all Lebanese have a strong interest in foreign countries through such networks.

Furthermore, the large amount of remittances from the Lebanese diaspora has been pointed out by almost all the previous studies as clear evidence of such networks. In fact, the World Bank has assessed that the remittances from the Lebanese diaspora amount to US\$8 billion per year and account for approximately 20% of the Lebanese GDP.<sup>25</sup> This huge amount of remittances has been considered clear evidence of “strong family ties and fervent nationalistic feeling toward Lebanon,”<sup>26</sup> and this data has also been thought to show that the Lebanese diaspora has a powerful influence over Lebanese politics and society.

We, however, are dissatisfied with the previous hypothesis, because most of the studies never exhibited clear and factual, quantitative (*large-n*) evidence; in other words, nearly all of them depended on qualitative field research and a limited number of interviews. Thus, to verify previous studies and the preceding hypothesis, we conducted two large-scale opinion polls in Lebanon.

<sup>24</sup> Abdelhady, *The Lebanese Diaspora*, p. 177.

<sup>25</sup> Sanket Mohapatra, Dilip Ratha, and Ani Silwal, “Outlook for Remittance Flows 2012-14: Remittance Flows to Developing Countries Exceed \$350 Billion in 2011,” Migration and Development Brief, No. 17, Migration and Remittances Unit, World Bank (December 1, 2011), p. 3.

<sup>26</sup> Hourani, “Lebanese Diaspora and Homeland Relations,” p. 5.



### 3. Lebanese Diaspora—Myth or Reality? “Middle East Opinion Poll (Lebanon 2010)” and an Alternative Hypothesis

#### 3.1 “Middle East Opinion Poll (Lebanon 2010)”

In this section, we discuss the first survey. The detailed survey method includes the following:

- *Survey date*: May-June 2010
- *Survey Type*: A cross-sectional survey was conducted using a stratified, random sampling of the Lebanese population (aged 18+). The data source was a sampling frame conducted by the Consultative Center for Documentation (CCD) adapted by the BCRI.
- *Survey Site*: A poll survey was conducted in Lebanon.
- *Target Population*: The target population was all individuals who met the following criteria:
  - (a) Inclusion criteria: 914 individuals were targeted, males and females, aged 18+.
  - (b) Exclusion criteria: Those who refused to participate at any time and for any reason.
- *Sample Size*: A survey on a stratified random sample of 914 respondents from all over Lebanon was conducted. Household interviews were conducted, taking into account respondents’ gender and age-group distribution. The sample was designed to be representative of the population under study. The sampling frame consisted of the sample (n=914) obtained from the Consultative Center for Documentation. The sample was chosen from the five governorates (Beirut, Mount Lebanon, North, South, and Bekaa), and distributed by different sects in the districts (see Tables II-1 and II-2). The number of clusters within the governorates was 26.



Table II-1: Cross Tabulation: 2010 (Governorates and Sects)

Gov. Sects	Beirut	Mount Lebanon	North	South	Bekaa	Total
Sunni	90	34	67	15	21	227
Shiaa	56	96	6	64	40	262
Maronite	17	75	58	18	20	188
Druze	10	39	0	11	4	64
Orthodox	18	11	27	8	7	71
Catholic	11	7	1	10	15	44
Arminian	14	8	0	0	5	27
Christian min.	6	0	1	1	2	10
Alawite	0	0	10	0	0	10
No response	7	1	0	2	1	11
<b>Total</b>	<b>229</b>	<b>271</b>	<b>170</b>	<b>129</b>	<b>115</b>	<b>914</b>

Source: “Middle East Opinion Poll (Lebanon 2010)”

Table II-2: Distribution of the Sample: 2010 (Governorates and Sects)

Governorates	Size of the Sample	Sects	Size of the Sample
Beirut	229	Sunni	227
Mount Lebanon	271	Shiaa	262
North	170	Maronites	188
South	129	Druze	64
Bekaa	115	Orthodox	71
Total	914	Catholic	44
		Arminian	27
		Christian minorities	10
		Alawite	10
		No response	11
		Total	914

Source: “Middle East Opinion Poll (Lebanon 2010)”

- *Questionnaire*: The questionnaire, which was prepared by our Japanese team in consultation with BCRI, was composed of 4-5 pages. The total expected time to fill out the questionnaire was estimated to be

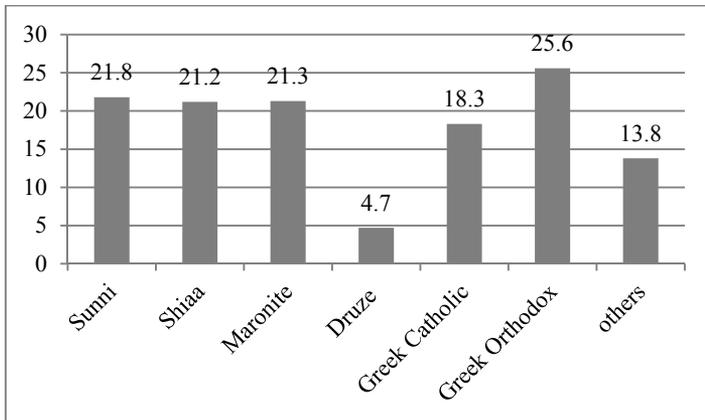


approximately 25-30 minutes.

- *Data Collection:* Survey teams, data collectors, and supervisors were identified and trained by the BCRI.

### 3.2 New Findings from the Opinion Poll

The results of the “Middle East Opinion Poll (Lebanon 2010)” went against the expectations suggested by most of the previous literature. In fact, the poll shows that the proportion of Lebanese who had lived abroad for more than six months in the past represents a mere 19% (men: 24%, women: 15%) of the whole. Comparing the respondents in age, educational background, and residential area (*muhafaza*), no significant difference can be found. Comparing respondents by religious confession, as Figure II-1 shows, there is no significant difference between Sunni, Shiaa, and Maronites (exceptionally, only Druze had an extremely low proportion). In contrast, when comparing the respondents by income level, we find a clear difference.

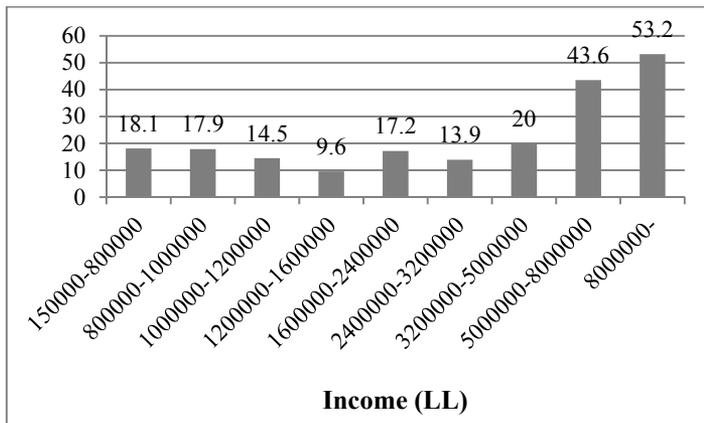


Source: “Middle East Opinion Poll (Lebanon 2010)”

Figure II-1: The Proportion of Lebanese Who Have Lived Abroad for More Than Six Months: Sects (%)



As Figure II-2 shows, more than 40% of individuals who have lived abroad for more than six months receive a monthly income of 5-8 million LL (US\$3,333-5,333), and more than half of the respondents receive a monthly income of 8 million LL (US\$5,333) or more. We found 5 million LL to be an important threshold. In other words, the existing image of Lebanese migrants only represents the respondents who receive a monthly income over 5 million LL.



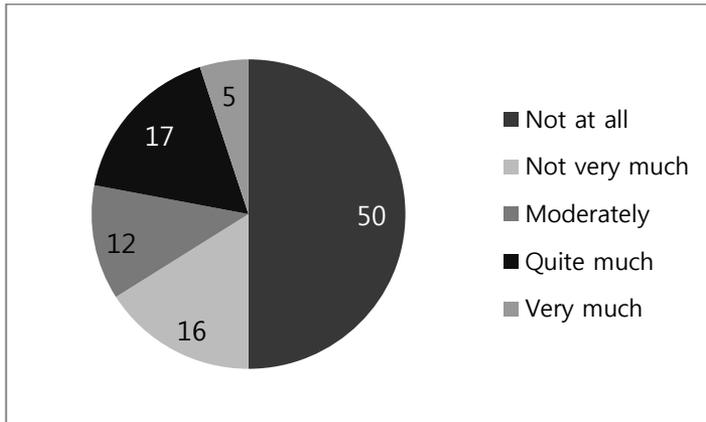
Source: “Middle East Opinion Poll (Lebanon 2010)”

Figure II-2: The Proportion of Lebanese Who Have Lived Abroad for More Than Six Months: Income (%)

Figure II-3 shows how many Lebanese who have experienced migration hope to repeat their cross-border movements. The figure shows that half the Lebanese respondents who have experienced migration do not want to migrate again at all. Given the fact that more than two-thirds of the Lebanese who have experienced migration display a negative attitude toward future cross-border movements, it is quite difficult to justify the stereotypical image of the Lebanese diaspora as those who “leave Beirut and the villages, then



return from abroad, only to depart again not too long later.”<sup>27</sup>



Source: “Middle East Opinion Poll (Lebanon 2010)”

Figure II-3: To what extent do you want to live abroad again?

Finally, we analyze the family and other relative networks between the Lebanese diaspora and their homeland. Only 17% of the Lebanese who have experienced migration selected “there are family or relative networks”<sup>28</sup> as the most important reason for migration. The largest number of the Lebanese who have experienced migration selected “good income” as the most important reason for migration (31%), and the second most important reason was “to acquire specialized skills” (21%). “There are family or relative networks” was only the third largest reason. Given these survey results, it is not logical to conclude that strong family ties are the most important reason for migration.

<sup>27</sup> Cohen, *Global Diasporas*, p. 94.

<sup>28</sup> In the poll, to make it easy for respondents to reply, the definition of “family” or “relative” was left to each respondent. Therefore, terms like “family” or “relative” are not necessarily in line with the meaning used in anthropology or other disciplines.



### 3.3 Is the “Strong Network” Really a Myth?

In accordance with this evidence, we have to conclude that there is a good reason to reconsider the previous literature and common beliefs about the Lebanese diaspora. On the other hand, it is true that the detailed observations of Lebanese politics and the economy show that there is considerable evidence to support the previous stereotypical images. For example, the above mentioned large amount of remittances from the Lebanese diaspora is obvious proof that there are strong networks between the Lebanese communities both inside and outside Lebanon. Why is there a large gap between the common conclusions of previous studies and our findings from the “Middle East Opinion Poll (Lebanon 2010)”?

To answer this question, Salim Nasr’s description seems to be a good starting point. He points out that there are two societies in contemporary Lebanon—“A wealthy, extrovert, spending and ostentatious minority, living and moving at par with [the] globalised world elite to which it aspires to belong; and a pauperized, expanding majority, stuck with a receding economy, limited horizons and declining opportunities.” He insisted that the disparity between the two societies continues to widen.<sup>29</sup>

In our most recent study, deriving the idea from Nasr’s above description, we discussed Lebanon’s economic polarization of recent years as the essential factor in the gap between the common conclusions of previous studies and our findings from the “Middle East Opinion Poll (Lebanon 2010).”<sup>30</sup> We hypothesize that, because only a small cadre of economic elites monopolizes “the global business network,” the *large-n* quantitative survey could not detect “the close networks of personal connections” as an important element in Lebanese society.

<sup>29</sup> Nasr, “The New Social Map,” p. 143. In addition, on the recent economic polarization in Lebanon, please see the statistical data of Heba Laithy, Khalid Abu-Ismael and Kamal Hamdan, “Poverty Growth and Income Distribution in Lebanon,” IPC Country Study, No. 13 (Brasilia: International Poverty Centre and United Nations Development Programme, January 2008). This report indicates that 28.5% of residents live below the upper poverty line (US\$4 per capita per day) and 8.1% live below the lower poverty line (US\$2.4 per capita per day).

<sup>30</sup> Takaoka, Hamanaka and Mizobuchi, “Experiences and Perceptions of the Lebanese toward Cross-Border Movements.”



This hypothesis is supported by another set of data from the “Middle East Opinion Poll (Lebanon 2010).” Figure II-2 clearly suggests a correlation between income level and cross-border movements. More than 40% of individuals who have lived abroad for more than six months receive a monthly income of 5-8 million LL (US\$3,333-5,333) and more than half receive a monthly income of 8 million LL (US\$5,333) or more. Another way to interpret this result is that the majority of middle- or low-income Lebanese do not receive any benefit. Thus, it leads us to hypothesize that the widespread image of Lebanese as “New Phoenicians”—those who “leave Beirut and the villages, then return from abroad, only to depart again not too long later”<sup>31</sup>—is represented only by a small cadre of economic elites.

We felt it was necessary to conduct another opinion poll in Lebanon to confirm our tentative hypothesis. Therefore, we conducted a second opinion poll survey in July 2012. In the next section, we take a look at the second opinion poll.

#### 4. New Data and Inspections: “Middle East Opinion Poll (Lebanon 2012)” and Verification of the Last Hypothesis

##### 4.1 “Middle East Opinion Poll (Lebanon 2012)”

The details of the survey methods in the second opinion poll in Lebanon are as follows:

- *Survey Date*: July 2012
- *Survey Type*: A cross-sectional survey was conducted using a stratified, random sampling of the Lebanese population (aged 18+). The data source was a sampling frame conducted by the Consultative Center for Documentation (CCD) adapted by the BCRI.
- *Survey Site*: A poll survey was conducted in Lebanon.
- *Target Population*: The target population was individuals who met the following criteria:
  - (a) Inclusion criteria: 812 individuals were targeted, males and females,

<sup>31</sup> Cohen, *Global Diasporas*, p. 94.



aged 18+.

- (b) Exclusion criteria: Those who refused to participate at any time and for any reason.
- *Sample Size:* A survey was conducted, based on a stratified random sample of 812 respondents from all over Lebanon. Household interviews were conducted taking into account respondents’ gender and age distribution. The sample was designed to be representative of the population under study. The sampling frame consisted of the sample (n=812) obtained from the Consultative Center for Documentation. The sample was chosen from the five governorates (Beirut, Mount Lebanon, North, South, and Bekaa) according to the distribution of different sects in each district (see Tables III-1 and III-2). The number of clusters within the governorates was 26.

Table III-1: Cross Tabulation: 2012 (Governorates and Sects)

Gov. Sects	Beirut	Mount Lebanon	North	South	Bekaa	Total
Sunni	85	15	97	15	21	233
Shiaa	43	95	0	67	33	238
Maronite	18	89	32	9	9	157
Druze	3	33	0	3	6	45
Orthodox	11	19	20	3	7	60
Catholic	7	11	0	10	15	43
Arminian	13	9	0	0	3	25
Christian min.	1	1	0	0	0	2
Alawite	2	0	7	0	0	9
<b>Total</b>	<b>183</b>	<b>272</b>	<b>156</b>	<b>107</b>	<b>94</b>	<b>812</b>

Source: “Middle East Opinion Poll (Lebanon 2012)”



Table III-2: Distribution of the Sample: 2012 (Governorates and Sects)

Governorates	Size of the Sample	Sects	Size of the Sample
Beirut	183	Shiaa	238
Mount Lebanon	272	Sunni	233
North	156	Maronites	157
South	107	Orthodox	60
Bekaa	94	Druze	45
Total	812	Catholic	43
		Arminian	25
		Christian minorities	2
		Alawite	9
		Total	812

Source: “Middle East Opinion Poll (Lebanon 2012)”

- *Questionnaire*: The questionnaire, which was prepared by our Japanese team in consultation with the BCRI, was 4-5 pages long. The total time to fill out the questionnaire was estimated at approximately 25-30 minutes.
- *Data Collection*: Survey teams, data collectors, and supervisors were identified and trained by the BCRI.

#### 4.2 Modifications to the Questionnaire and New Findings

To verify our most recent hypothesis and to provide further details of the cross-border movements and the close networks of personal connections among the Lebanese inside/outside Lebanon, we made some modifications to the questionnaire in the second opinion poll. The most important modification was the addition of a new question regarding the network of personal connections: *Q. How frequently do you contact your relations, acquaintances, or friends abroad? Which country are they living in? How strong is the connection between you and them (family members, relatives, friends, colleagues, and others)?*<sup>32</sup> Our objective in asking these questions is to find

<sup>32</sup> Also in the “Middle East Opinion Poll (Lebanon 2012),” to make it easy for respondents to reply, the definition of each word was left to each respondent. Therefore, terms like “family”

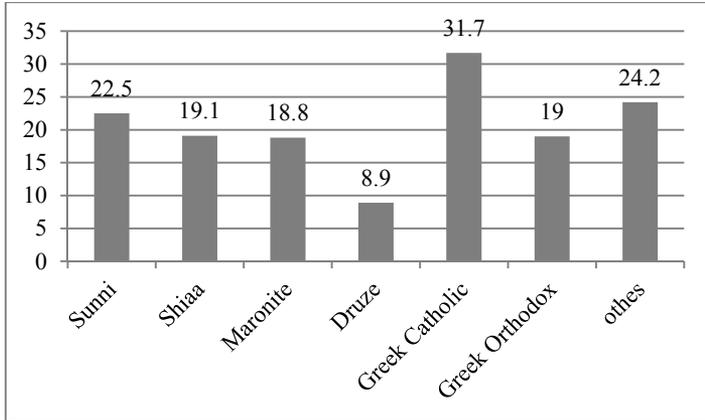


out what kinds of networks the Lebanese have and how frequently they use those networks. If our last hypothesis were true, the respondents with high incomes would enjoy a high frequency of contact with their human networks abroad and have a broad range of human relationships outside of their family. By contrast, respondents with middle or low incomes would have little access to their networks abroad, or would not have such networks at all, and the range of communication would be narrow.

The results of the “Middle East Opinion Poll (Lebanon 2012)” show that, as in the “Middle East Opinion Poll (Lebanon 2010),” only 20.3% of the whole population has lived abroad for more than six months. This result also went against the expectations suggested by most of the previous literature, as we discussed in section 2. Compared with the results of the polls in Syria (20.3% in 2007) and Palestine (26% in 2009, 23.3% in 2012), these percentages are not high. Comparing respondents by age, educational background, and residential area (*muhafaza*), there is no significant difference in the “Middle East Opinion Poll (Lebanon 2012)”; when comparing them by religious confession, as Figure III-1 shows, the percentages of each sect are almost parallel to those in the “Middle East Opinion Poll (Lebanon 2010).” There are no significant differences in Sunni, Shiaa, and Maronites. Only Druze showed an extremely low figure. Based on these results, the correlation between cross-border movements and religious confession is not confirmed. Therefore, the authors do not enter further discussions on cross-border movements from the viewpoint of religious confession.

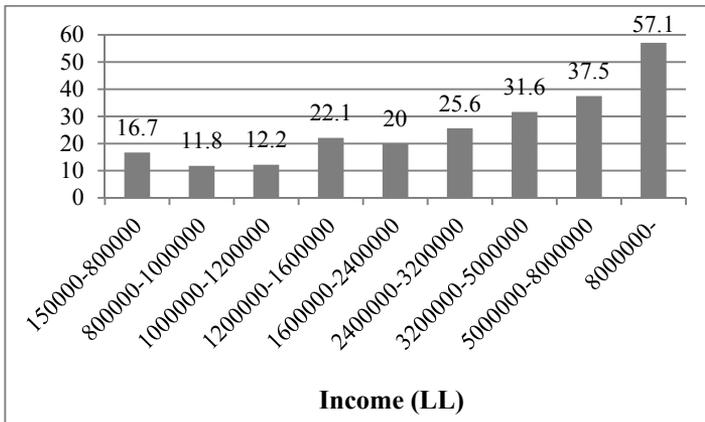
This percentage means that the majority of Lebanese were not active in cross-border movements. In addition, Figure III-2 shows that 37.5% of Lebanese who receive 5-8 million LL (US\$3,333-5,333) in monthly income and 57.1% of who receive more than 8 million LL (US\$5,333) have lived abroad for more than six months. In other words, their living-abroad experiences increase the average. Statistically, the correlation between their experiences and income are also confirmed. Thus, these facts support our last hypothesis.

or “relative” are not necessarily in line with the meaning used in anthropology or other disciplines.



Source: “Middle East Opinion Poll (Lebanon 2012)”

Figure III-1: The Proportion of Lebanese Who Have Lived Abroad for More Than Six Months: Sect (%)



Source: “Middle East Opinion Poll (Lebanon 2012)”

Figure III-2: The Proportion of Lebanese Who Have Lived Abroad for More Than Six Months: Income (%)



Among the Lebanese, 52.9% of those who have lived abroad for more than six months considered “good income” an important factor in their decision to go abroad. “Study” (24%) and “live with relatives” (23.1%) followed. This tendency, which is the same as in the “Middle East Opinion Poll (Lebanon 2010),” challenges the assumptions in previous studies about the cross-border movements of the Lebanese and the Lebanese diaspora, because these studies consider the role of close networks of personal connections between the Lebanese diaspora and the homeland in cross-border movements to be self-evident. Actually, Guita Hourani clearly argues, “These networks were and continue to be vital in linking Lebanese residents with their transnational emigrants and *vice versa*. They help in sponsoring new emigrants and in facilitating their lives in the receiving countries.”<sup>33</sup> However, Hourani’s argument is not clearly supported by evidence from our two polls.

Regarding the new question added in the second opinion poll, as Tables III-1 and III-2 show, we were able to get additional information about the reality of the networks of personal connections among the Lebanese inside/outside Lebanon. We found that 62.0% of Lebanese communicate with their family members abroad “very frequently” and “frequently,” while 39.3% communicate with their relatives, 23.7% with friends, and 14.4% with colleagues. Thus, the close networks of personal connections among the Lebanese inside/outside Lebanon are almost exclusively limited to their *family members*.

It is noteworthy that respondents with high incomes (more than 5 million LL per month) seem to have a broader range of human relationships beyond family members compared to respondents with middle or low incomes (less than 5 million LL per month). In fact, Tables III-3a, III-3b and III-3c obviously show that the ratio of respondents who communicate with their family members, relatives, or friends abroad “very frequently” or “frequently” is higher among respondents with high incomes. In contrast, respondents with middle or low incomes keep in touch less frequently with Lebanese living abroad and their range of human relationship is narrow: it is limited almost exclusively to family members. In sum, those who receive high incomes clearly have broader networks of personal connections abroad than those who receive middle or low incomes. Thus, it is reasonable to conclude that our assumption

<sup>33</sup> Hourani, “Lebanese Diaspora and Homeland Relations,” p. 5.



is correct.

Table III–3a: Frequency of Lebanese Communication with Family Members, Relations, Friends, Colleagues, or Others (%)

	Very frequently	Frequently	Moderately	Not Very frequently	Never	Undecided
Household members	37,4	24,6	11,2	4,5	19,2	3,0
Relatives	19,3	20,0	22,3	15,1	22,0	1,3
Friends	12,9	10,8	17,1	17,9	38,9	2,4
Colleagues	7,2	7,2	8,2	13,6	57,2	6,6
Others	1,5	2,0	5,4	3,5	74,5	13

Source: “Middle East Opinion Poll (Lebanon 2012)”

Table III–3b: Frequency of Lebanese Communication with Family Members, Relations, and Friends (Monthly income more than 5 million LL: %)

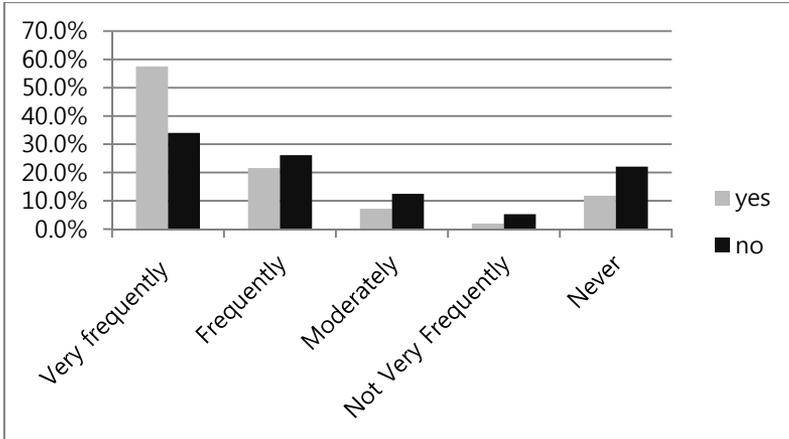
	Very frequently	Frequently	Moderately	Not Very frequently	Never	Undecided
Household members	64,3	17,9	10,7	0	3,6	3,6
Relatives	30,0	23,3	23,3	13,3	10,0	0
Friends	20,7	20,7	24,1	17,2	13,8	3,4

Source: “Middle East Opinion Poll (Lebanon 2012)”

Table III–3c: Frequency of Lebanese Communication with Family Members, Relations, and Friends (Monthly income less than 5 million LL: %)

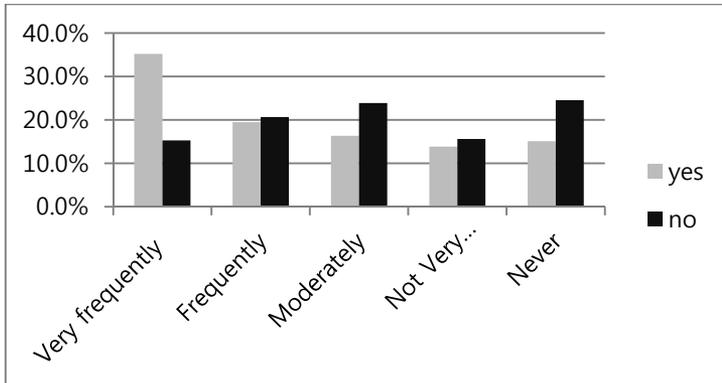
	Very frequently	Frequently	Moderately	Not Very frequently	Never	Undecided
Household members	38,6	22,5	11,0	4,6	21,5	1,8
Relatives	20,5	18,3	21,4	15,6	23,1	1,1
Friends	13,3	10,0	17,1	18,4	39,5	1,6

Source: “Middle East Opinion Poll (Lebanon 2012)”



Source: “Middle East Opinion Poll (Lebanon 2012)”

Figure III-3a: Living-Abroad Experience (More than six months, *Yes* or *No*) and Frequency of Communication with *Family Members* Living Abroad

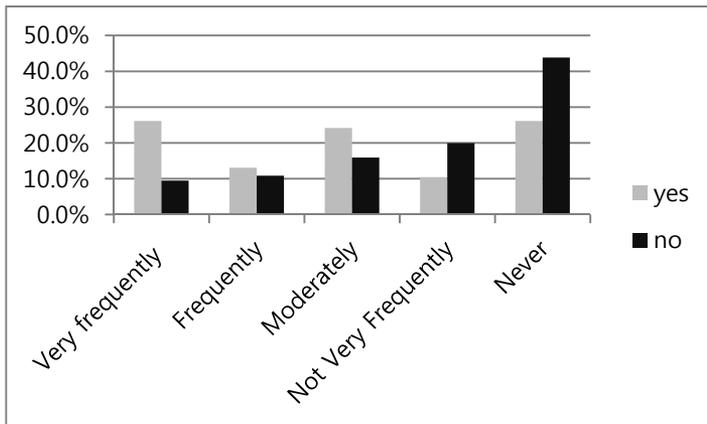


Source: “Middle East Opinion Poll (Lebanon 2012)”

Figure III-3b: Living-Abroad Experience (More than six months, *Yes* or *No*) and Frequency of Communication with *Relatives* Living Abroad



Concerning frequency of communication, Figure III-3a, Figure III-3b, and Figure III-3c clearly show that the respondents who have the experience of living abroad for more than six months tend to keep in touch with their family, relatives, and friends living abroad. By contrast, respondents with no experience living away from their homeland seem to keep in touch less frequently with Lebanese living abroad.



Source: “Middle East Opinion Poll (Lebanon 2012)”

Figure III-3c: Living-Abroad Experience (More than six months, *Yes* or *No*) and Frequency of Communication with *Friends* Living Abroad

In sum, the Lebanese who has experience in living away from his homeland long-term makes a greater effort to maintain his or her network of personal connections while abroad than one who does not have such experience.



## 5. Conclusion and the Prospect for Further Research

As we discussed in section 2, most of the previous studies have assumed the following hypothesis: the Lebanese diaspora continues to have strong attachments to the homeland based on close networks of personal connections, and almost all Lebanese have a strong interest in foreign countries through such networks. That is why the Lebanese have commonly come to be known as the “New Phoenicians,” those who “leave Beirut and the villages, then return from abroad, only to depart again not too long later.”<sup>34</sup> Furthermore, the large amount of remittances from the Lebanese diaspora has been pointed out by almost all of the previous studies as clear evidence of such networks.

The BCRI conducted the “Middle East Opinion Poll (Lebanon 2010)” and the “Middle East Opinion Poll (Lebanon 2012)” in collaboration with our Japanese research team in May-June 2010 and July 2012, which, however, presented two serious challenges to the stereotypical conclusions.

First, both opinion polls showed that, in sharp contrast to the fact that those who enjoy high income are prone toward migration, the general attitude of average- or low-income Lebanese is not inclined toward cross-border movement. Clearly, income level is the most important variable. It is suggested by this fact that, because only a small cadre of economic elite monopolizes “the global business network,” the *large-n* quantitative survey could not detect “the close networks of personal connections” as an important element in Lebanese society. Thus, it leads us to conclude that the widespread image of the Lebanese as “New Phoenicians” represents only a small segment of society. In contrast, the majority of middle- or low-income Lebanese do not receive any benefit from it.

Second, the close networks of personal connections among the Lebanese inside/outside Lebanon are, to some degree, limited to their *family members*. In general, Lebanese with high incomes would enjoy a high frequency of contact with the people in their networks abroad and have a broad range of human relationship outside of their family. In contrast, Lebanese with middle or low incomes would have little access to their networks abroad, or would not have such networks at all, and the range of communication would be narrow.

<sup>34</sup> Cohen, *Global Diasporas*, p. 94.



Furthermore, Lebanese who have the experience of living abroad for more than six months tend to frequently keep in touch with their families, relatives, and friends living abroad. In contrast, Lebanese with no experience of living abroad seem to keep in touch less frequently with Lebanese living abroad. Together these facts mean that only a small cadre of Lebanese who have experience with cross-border movements and who receive high incomes are actually represented by the widespread image of the relationship between the Lebanese diaspora and the homeland.

In this article, we clarified the fact that the close networks of personal connections inside/outside Lebanon and the benefits extracted from them are monopolized by a small cadre of economic elites. In contrast, most middle- or low-income Lebanese do not receive any benefit. Based on this conclusion, we assume that the small cadre of economic elites is exactly the so-called *za'im* in the political arena. *Za'im* refers to the economic and political elites who maintain a robust patron-client relationship within Lebanese society. The patron-client relationship is, as argued by James Scott, “a largely instrumental friendship,” “in which an individual of higher socio-economic status (patron) uses his own influence and resources to provide protection or benefits, or both, for a person of lower status (client) who, for his part, reciprocates by offering general support and assistance, including personal services, to the patron.”<sup>35</sup>

According to Michael Johnson, in the Confessional system (*al-nizam al-ta'ifi*) that is peculiar to Lebanon, *za'im* successfully maintained political loyalty from their *protégés* in two important ways: first, by being regularly returned to office in order to influence the administration and continuously provide their *protégés* with governmental services in arbitrary manners; and second, by closely associating with both domestic and global business

<sup>35</sup> Scott continues: The patron-client relationship “is the *face-to-face*, personal quality of the relationship. The continuing pattern of reciprocity that establishes and solidifies a patron-client bond often creates trust and affection between the partners. When a client needs a small loan or someone to intercede for him with the authorities, he knows he can rely on his patron; the patron knows, in turn, that ‘his men’ will assist him in his designs when he needs them. Furthermore, the mutual expectations of the partners are backed by community values and ritual.” James C. Scott, “Patron-Client Politics and Political Change in Southeast Asia,” *American Political Science Review*, Vol. 66, No. 1 (March 1972), pp. 91–113, at p. 92 and p. 94.



communities so they could use their commercial and financial contacts to give their *protégés* employment, spoils, contracts, and capital.<sup>36</sup>

As previously stated, it seems plausible that the monopoly of global personal and business networks by *za'im* would contribute to maintaining the patron-client networks. In future research, we should use qualitative methods to identify the real economic and political characteristics of *za'im* and analyze their relationship with their cross-border movements and human network inside/outside Lebanon.

Finally, to make the research more comprehensive, it is necessary to conduct a large-scale survey that covers all Lebanese who live abroad. In this sense, we acknowledge that this research project remains incomplete. However, as we mentioned, it seems to be extremely difficult. For instance, where should we conduct the opinion poll at first? How many samples do we need to collect? There is no way to figure out the real number of Lebanese spread across the world. In addition, we need enormous resources to conduct an opinion poll that covers all Lebanese who live abroad. Nevertheless, given the fact that this is the first attempt to understand the relationship between the Lebanese diaspora and the homeland based on a *large-n* scale opinion poll, we believe that this study is a worthwhile challenge.

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<sup>36</sup> Michael Johnson, *Class and Client in Beirut: The Sunni Muslim Community and the Lebanese State 1840-1985* (London: Ithaca Press, 1986), p. 48.



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