Ageing, migration and development

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Introduction

Wary of further inflating what Carling (2017) has called the 'nexification' of the migration literature, this chapter brings into conversation with each other the established conceptual frame of the 'migration-development nexus' (Van Hear and Sørensen 2003; Faist et al. 2011), and the newly-coined 'ageing-migration nexus' (Lulle and King 2016, 5; King et al. 2017). We therefore construct 'ageing-migration-development' as a triple nexus which examines the various ways that ageing migrants (and non-migrants) interact with the process of 'development' through the medium of migration. The key focus of the chapter, *ageing,* is routinely left out of the general debate on migration and development, which tacitly assumes that migrants, as potential agents of development, either in their home countries or in the places they move to, are young and economically active.[i] Where older people are brought into this debate, they are usually cast in a negative or problematic light – for instance as 'left-behind' in shrinking residual populations in peripheral regions, as responsible for the 'crisis' in pensions and healthcare provision affecting ageing societies, or as retirement migrants putting pressure on health services in attractive destination regions (Skeldon 1997, 87-88; Lucas 2005, 295-296). Yet, when introducing older migrants into the migration-development debate, we must be careful not to over-compensate their previous omission by an over-celebratory or exaggeratedly positive role. We pay heed, therefore, to the fragilities and vulnerabilities that they are also prone to.

Defining ageing in the context of migration and development

At the risk of tautology, we define ageing as a biological process of becoming older. More disputable are the age thresholds for becoming an 'older person' or 'senior citizen', with the privileges and penalties that such critical junctures bring – for instance pensions and free healthcare vs old-age discrimination and loss of the right to work. A fundamental point to stress is the variable ways in which 'older-age' is culturally constructed across different societies which are also reflected in different policy stances towards older people, including ageing migrants. Ageing is geographically emplaced (Andrews and Phillips 2005) and the significance of this is enhanced in a context of migration between societies at different levels of development, through for example citizenship empowerment, income returns, rights to work, pensions and welfare, and the emic perspective of how older migrants 'feel' in different geographical settings (McHugh 2003). A major gap in research concerns lower-income countries where studies on ageing migrants, except as returnees, is seriously lacking.

Different 'models' of ageing also compete for attention, and these orthodoxies, too, can be projected into the context of migration and development. On the one hand there is the traditional, dominant trope of vulnerability and of the need to somehow cope with old age in migratory contexts: ageing migrants are seen as marginalised and excluded from policy and practices, except as a welfare need (King et al. 2017). This is contrasted with the notion of 'healthy', 'active' ageing (Bytheway 2000) – a celebratory view of independent self-reliance

and valorisation of experience which can have positive development impacts, in ways which will be discussed later. Yet this neoliberal, individualistic construction of a 'good' and active older age also has its downside. The danger is that it overlooks the real developmental questions relating to care needs, community engagement and exclusionary infrastructures and bureaucracies, and the fact that, in many countries, successful ageing is less about individual independence and more about dignity, respect, family support and physical relaxation (Gardner 2002).

Ageing, then, is not suddenly being an older person at a fixed age threshold (60, 65 or whatever). Rather, it is a multi-faceted process of gradually 'becoming': seeing oneself, and being seen by others, as older than before (Worth 2009). We envision ageing as a long-term process which typically starts with a mid-life consciousness of impending older-age. The onset of ageing may thus start in one's 40s and last for another 40 years or more – half the life cycle (Lulle and King 2016, 2-3). The longer-term perspective on ageing enables us to draw a broad contrast between the 'young-old' – still active, independent and energetic – and the 'old-old' – more dependent, frail and vulnerable. Whilst recognising this division as heuristically useful, especially in a developmental context, it is not absolute and, pushed too far, reflects age determinism and ignores the variety of individual experience.

After this wide-ranging discussion on the nature of ageing, we look more briefly at definitions of migration, development, and the migration-development nexus. There exist a litany of definitions of migration which are also scoped by other contributions to this handbook. For our purposes here, migration is a straightforward notion. It is the movement of a person or people from one country or place to another, with the intention of residing there for a significant period of time, such as at least six months or a year (Hammar and Tamas 1997, 16). Development is a much more 'chaotic' concept expressed at multiple scales – global, national, local, and individual. It has been subject to an evolution of meanings, starting with mainly economic variables but progressively encompassing more social, humanitarian and quality-of-life elements, including choice and control over one's life. Like both ageing and migration, development is a dynamic term that implies change, growth, advancement (Skeldon 1997, 1); 'a comprehensive concept that expresses positive change in society' (Sinatti and Horst 2015, 139). Increasingly, development connotes an egalitarian principle: 'change for the many, not for the few'.[ii]

Carling's (2017) recent definition of the migration-development nexus as 'the totality of mechanisms through which migration and development dynamics affect each other' implies that causality goes in both directions and plays out in multiple ways. Likewise with ageing and migration: there are multiple connections, and they feed through to influence, and be shaped by, development in a variety of interactions which are the main components of the rest of this chapter. Much work lays ahead to understand how these interactions co-produce and build on each other, shaping migration flows, producing development outcomes, and affecting ageing migrants themselves – in their countries/regions of origin, in the countries/regions where they reside, and in the transnational/translocal spaces which constitute their lifeworlds.

Older people and their varying positionality within structures of uneven development

Both ageing and migration, as well as ageing migrants, are closely linked to the phenomenon of uneven spatial development, at a variety of scales from the local to the global. Forty years ago Seers (1979) mapped out the pessimistic, neo-Marxist scenario of migration-development interdependencies for Europe, and more recently Delgado Wise and Márquez Covarrubias (2011) have re-articulated these ideas in the Mexico-US context. Migration from 'peripheral' countries to the global and regional 'core' economies reflects and perpetuates two-way but asymmetrical relations of dependency. Core economies need cheap and flexible migrant labour to keep costs down, remain competitive, and to do the jobs that native workers shun. Peripheral countries become structurally reliant on core countries as the market for their chief export, labour, thereby creating and reinforcing their own form of dependent development, reliant chiefly on remittances. In the past such labour migrations were governed by specific schemes such as the Mexican *bracero* programme or the West German *Gastarbeiter* (guestworker) model of temporary labour recruitment, both with past echoes of slavery and indenture (Cohen 1987; Potts 1990). Nowadays, 'Western' neoliberal ideals of 'free movement' (as in Europe) are tempered by ambiguous policies of migration control designed to appease electorates who have been persuaded by right-wing (and some left-wing) ideologies that migration is a 'problem' that needs to be 'solved', if necessary by creating a 'fortress' around Europe or by trumpeting the need for a 'great, big beautiful wall' along the US-Mexico border.

Underdevelopment due to historical oppression, wars, colonial and neo-colonial exploitation on the one hand, and to neoliberal policies of individual responsibility, state roll-back, austerity and structural adjustment on the other, have created migration paths with specific age and gender characteristics. The typical 1960s guestworker was a young man, poor but fit and healthy, ready for work in the factory or construction site; as soon as he became older or sick, the labour rotation system sent him back to his home country.[iii] This masculinist model, brilliantly but one-sidedly analysed in two classic texts of the era (Berger and Mohr 1975; Piore 1979), tended to overlook the fundamental role of women as labour migrants in the early postwar decades of Europe's reconstruction and growth. Women, too, were recruited, as factory workers, cleaners, and health services staff in Britain and the other North-West European economies – as recorded by McDowell (2005, 2013). In more recent decades, as ageing has become a major demographic challenge of Western societies, the need for female migrant workers to plug the care gap, especially for older and frail people, has become an increasingly important component of the global labour market (Hondagneu-Sotelo 2001; Parreñas 2001). In short, migrant women from poor countries, many of whom are ageing themselves, are called upon to look after the elderly of the rich West. Thereby they contribute to the development of the higher-income countries, often to the detriment of their own care duties and preferences back home (Silvey 2009).

In our recent critical review of studies on ageing and migration (King et al. 2017; Lulle and King 2016, 5-9), we have developed a typology which we now extend within a more explicit developmental context. The typology comprises four main scenarios: i) intergenerational care in a context of global uneven development, ii) international retirement migration, iii) ageing economic migrants, and iv) ageing return migrants. We consider each in turn.

Development, migration and the challenge of intergenerational care

Toyota et al. (2007) have pointed out that the category of older people 'left behind' by their migrating children has itself been largely left behind by the literature on migration and its impacts.[iv] Termed by King and Vullnetari (2006) 'orphan pensioners', these semi-abandoned older people have recently become the focus of increased scholarly attention in places as far apart as Albania (King and Vullnetari 2006), Bolivia (Bastia 2009) and China (Congzhi and Jingzhong 2014). The ageing parents of migrants face both material and emotional vulnerability, coping as best they can on meagre pensions (perhaps boosted by remittances from their children) but above all beset by loneliness in a setting where population is declining along with other aspects of the rural economy and social life. These realities of peripheral underdevelopment need policies to foster community building and infrastructure for all older people living in places that are profoundly shaped by the mass outflow of younger people.

However, research is also emerging to show that more active caring and even economic roles of erstwhile 'abandoned' older people are recognised (Bastia 2009; King and Vullnetari 2009). These studies emphasise the care-giving work done by older parents, and especially grandparents (looking after grandchildren so that both parents can migrate for work), as well as the more economic role played by these older non-migrants as the managers and investors of remittances. Managing households, making investments, administering remittances, and supervising formal as well as informal business practices on behalf of children who live and work abroad requires considerable and diverse skills, including knowledge of financial planning, communication technologies, building techniques and continuing embeddedness in local networks.

Yet, migrants' parents are not always condemned to 'stay put'. Depending on visa regulations, they may engage in 'follow-the-children' migration, either for temporary stays conditioned by visitor or tourist visa time-limits, or longer-term. Such mobilities can have many purposes or functions: to both give and receive family care; to work, perhaps on a casual or part-time basis; and to access a better healthcare system. All these circumstances – both in their positive and negative elements – are exemplified in recent research on the migration experiences of the Albanian 'zero-generation' parents of the first-generation migrants (King et al. 2014). Along similar lines, Tiynen-Qadir (2016) has studied the phenomenon of 'transnational babushka' – Russian grandmothers and even great-grandmothers who travel to Finland to help with childcare. They also help to educate the younger generations, taking them to private lessons, teaching them Russian and engaging them in Russian diaspora life. For the Russian older women themselves, they are able to enrich their own self-development, pursuing lives that are less constrained by gender and age stereotypes, forming new intimate relationships and developing small business activities, thanks to their mobile positioning across borders.

International retirement migration

International retirement migration (IRM) is one of the most readily recognised intersections between ageing and migration and has been thoroughly studied in recent years, although research gaps remain. The overviews of IRM provided by Casado-Díaz et al. (2004) and King (2012) summarise all but the very latest literature and draw the typical contours of the phenomenon, albeit less has been written on its developmental and care implications.

IRM evokes an image of wealthy North Europeans who seek a peaceful life and good amenities in a warmer and sunnier climate, where they can also avail themselves of cheaper living costs – housing, heating, food and drink, and healthcare services – where their pensions and dividends from investments will stretch further than in their home countries. The portability of pensions is crucial to IRM, and also gives an insight into its spatial distribution. For the British case, data from the Department of Work and Pensions show that two groups of countries stand out as key destinations where the DWP pays pensions: anglophone countries such as Australia, New Zealand, the USA and Canada, where many retirement migrants have either moved independently or, more likely, followed their already-settled children; and European 'sunbelt' countries where IRM has been most intensively studied (Spain, Italy, Portugal, Cyprus and Malta). Taking the Spanish case, data from the Office for National Statistics for 2016 reveal that 40 per cent of British citizens resident in Spain are over 65, up from 32 per cent in 2011.[v]

Outside of Europe, IRM is also well-established in North America (from Canada and the northern and central US states to destinations in Florida and California, and latterly also Mexico), and in South-East Asia, notably to Thailand (Gustafson 2001; Truly 2002). As well as the geographical variations in these latitude-spanning retirement migrations, there are different temporal regimes, ranging from permanent, year-round relocation, to seasonal 'snowbirds' escaping the northern winters.

The developmental aspects of IRM are less commonly addressed. Apart from those who deliberately seek an isolated, 'off-grid' environment, retirement migrants are in need of physical infrastructures such as good-quality housing (sometimes restored older properties in rural areas), fast transport links, and decent healthcare services. Along many stretches of the Spanish Mediterranean coast, and in the larger Canary islands, the scale of IRM (combined with tourism) has shaped the entire character of the built environment, economy and 'culture' of the resorts and their associated *urbanizaciones* – purpose-built estates. Whilst retirement migrants bring many benefits to the local economy, stimulating the demand for housing, goods and services, there are downsides too. These include squeezing local people out of the coastal housing market, environmental pressures, and a kind of neo-colonial reshaping of the 'culture', with many foreign retirees failing to integrate or learn the local language (O'Reilly 2000).

The final set of issues concerns satisfying the health and care needs of this elderly migrant population. Whilst most retirees move when they are 'young-old', inevitably they sooner or later transition to the frailer 'old-old' and generate pressures in multiple dimensions – on themselves in terms of how to cope with failing health and reduced mobility, on local doctors and hospitals, and on their families to arrange transnational care. These transitions, including

the final transition to death, need further research, both in terms of care services and from a psycho-social wellbeing perspective (Hardill et al. 2005; Oliver 2008). The end-game may be a painful return to the country of origin.

Ageing economic migrants

For this category of people within the ageing-migration-development nexus, we consider both those who migrated for economic reasons as young men and women and who subsequently remained in their migration destination through the rest of their working lives and beyond, and those who embarked on the migration trail as mature-age economic migrants, for instance in their 40s, 50s and 60s.

We call the first subgroup 'ageing-in-place' migrants. They stay abroad as migrant workers for a variety of reasons – economic (there is no future for them back home), family (their children and grandchildren are abroad), socio-cultural (they feel more 'integrated' abroad than they now would in their home countries), and health/welfare (access to better medical facilities, pension payments and other welfare services). From a development point of view, provided they remain in work, they make a net contribution to the economy of their country of settlement. However, as soon as they reach pensionable age, and if they start to make costly demands on the health service, their net annual fiscal contribution becomes negative.[vi] They suffer what Dowd and Bengtson (1978) called the 'double jeopardy' of being both an older person and a migrant, which leads potentially to an interlinked range of vulnerabilities – weak physical and mental health, low income, poor housing, and (self-)exclusion from care and welfare services (Fokkema and Naderi 2013). Some of these problems may be compensated by the strength of family and ethnic-community support mechanisms. Writing respectively on the Cypriot and Bengali migrant communities in London, Cylwik (2002) and Gardner (2002) have demonstrated how a strong ethos of family solidarity inculcated inter-generationally leads to older migrants being cared for as far as possible within the family sphere. For these ageing-in-place migrants, a 'good' old age is not so much about being active, independent and self-reliant, but being surrounded by caring and respectful family members.

For other economic migrants growing older in their destination countries, a relaxed old age is beyond their reach. They may need to continue working in order to keep sending remittances to support their families in the country of origin. Two examples illustrate this economic entrapment. Hunter (2011) has studied the lives of older North African men who continue to live in migrant-worker hostels in France, even beyond retirement age. They remain there in order to maximise their pension rights and avail of better health services, and also because, in some cases, they have been estranged from their families for so long that they fear the challenges of return and reintegration. The second example is of Filipina care-workers in Los Angeles, who need to keep working because they have no pension rights and are responsible both for supporting themselves, and family members in the Philippines. Most are carers for single elderly or frail men and women, who in some cases are actually younger than themselves. The result is that 'the unretirable elderly care for the retired elderly' (Nazareno et al. 2014).

Finally, there are older economic migrants who depart their home country at a mature age. Our own research on Latvian women in the UK is arguably the most detailed study of this genre (Lulle and King 2016). Condemned to the prospect of a poverty-stricken old age in Latvia due to pension and welfare cuts in the neoliberal post-Soviet era, these older women, many of whom are divorced, separated or widowed, have been coming to Britain since the 1990s, but especially since Latvia's entry to the EU in 2004, in order to find work to support themselves, and their children and grandchildren back home. Most have found employment as agricultural workers, cleaners, nannies and carers. Given the devaluation of Latvian pensions to a pittance, they become 'target earners' in a dual sense – to build up surplus income to support family members and invest in real estate back home, and to accumulate sufficient years in order to qualify for a more valuable UK pension. However, we found that these women's migratory trajectories did not solely lead to a better economic future; they also achieved enhanced personal and emotional wellbeing through their experiences of independence, self-development, and more active social and romantic lives.

The developmental potential of ageing return migrants

In his well-known typology of return migration and development, Cerase (1974) posits different stages, based on research on migrants returning from the United States to Southern Italy in the early postwar decades. The 'return of conservatism' occurs when the migrant returns after just a few years: the developmental impact is rather weak because the migrant has not changed much and still thinks and behaves according to the norms and values of the home society, which were still somewhat 'traditional' in Southern Italy at this time. For those who return after a longer period away – typically ten years or more – there is the potential of the 'return of innovation'. By this time, it is hypothesised that migrants will have internalised new values and behaviours from the host society, regarding for instance business practices, politics and social principles, and be ready to transfer these innovative stimuli to the home-country setting. This developmental potential is rarely realised, at least in Cerase's study, for two main reasons. First, few migrants return at this stage in their migratory careers (typically in their 30s or early 40s) because they see their futures as much brighter, also for their children, in the United States. Second, for those who do return fired with energy and enthusiasm, their ambitions are thwarted by the enduring power of the entrenched local elites and clientelistic social networks. The final element in Cerase's life-stage model of return is the 'return of retirement', which the author assumes to have minimal developmental impact as these older migrants merely wish to live out their final years in a quiet and relaxed manner.

At a distance of more than 40 years, Cerase's model, with its simplistic linear logic, seems dated and ageist. Being a sociological model, it ignores the economic impact of retired migrants who return to their countries of origin. Like the IRM category described earlier, they 'import' their pensions and savings, and make investments in the local economy, as well as generating consumer demand for goods and services. Even as a social model, it is deficient as it overlooks the impact of retirees' accumulated experience and of their own changed attitudes – what Levitt (1998) has proposed as 'social remittances'. Nevertheless, we must be careful not to brush aside the more problematic aspects of the 'return of retirement'. Long-absent migrants tend to hold idealistic images of their homeland, often frozen in the past, and

envision it as an idyllic place to which to retire. They fail to appreciate that nothing is static: both the homeland and they themselves have changed, and the return may bring disillusionment. As an example, a study by Barrett and Mosca (2013) of Irish older returnees found that their imaginations of a peaceful life in the Irish countryside were negated by significant readjustment challenges and experiences of social isolation.

Very different from this picture of retired Irish migrants from urban Britain struggling to re-adapt to life in rural Ireland is Sun's research on high-skill older Taiwanese returning to their homeland from the USA. Whilst some return-migrated in order to access affordable, yet good-quality healthcare, which can be prohibitively expensive in the US (Sun 2014), many were motivated by altruistic economics – they wanted to 'give something back' to their motherland. Despite being officially retired from their professional jobs in the US, they in fact do not retire, but start a new later-life career in Taiwan. Working especially in science, technology and medicine, they take, or are offered, posts in universities, research institutes, hospitals and private companies. They bring specialist knowledge, social and cultural capital, new ideas and practices acquired during their professional working lives in the US, and aspire to apply these 'professional remittances' (Sun 2016) to help the development of Taiwan. However, this was not always a smooth process, and Sun's research participants also articulate a narrative of frustration at some of the barriers to their 'modernising' aspirations, which brought out the disjuncture between them as 'Americanised Taiwanese' and their co-ethnics in Taiwan.

Conclusion

In challenging the dominant 'vulnerability trope' associated with ageing migrants, we have explored in this chapter the connections between ageing migrants and a more positive range of development scenarios, both for the places they migrate from, to, and then return to, and in terms of older migrants' own active agency and self-development. Against the 'double jeopardy' of being both an ageing person and a migrant, we have sought to stress the values of knowledge, experience, respect and inter-generational solidarity. The fact that migrants are moving towards and beyond the end of a 'normal' working life, does not mean that they cannot be economically active, innovative and resourceful. The Latvian and Taiwanese cases reviewed above are good illustrations of this important principle (Lulle and King 206; Sun 2016). At the same time, we should be careful not to righteously impose neoliberal Western models of active, independent ageing on migrants who originate from cultures where 'good' ageing is associated with a different set of values and customs.

We must also be careful to avoid viewing all ageing migrants through a simplistic bifocal lens of origin and destination. Many ageing migrants – ageing-in-place labour migrants, late-life economic migrants, international retirement migrants, returned emigrants, and even non-migrant family members – wish to engage in regular transnational mobility which keeps them in touch with both 'here' and 'there', and perhaps other 'theres' too. The ability to lead a transnationally mobile lifestyle is a privilege not open to all older people: good health, financial resources and the legal ability to be mobile across borders are some of the conditioning factors. But, where and for as long as it can be sustained, a transnational mode

of living in older age, with frequent contact with scattered family members, is often found to be desirable for those embedded in migrant families, and a crucial component of their wellbeing.

Finally, we return to the issue of care, a central theme in any discussion of older migrants' wellbeing – not only the ability and right to receive care from the family or from state welfare services, but also the ability to give care to children and grandchildren. Pension rights and their transferability across borders are another element in older migrants' economic, and hence psycho-social wellbeing, but only for those employed in the formal economy where pension rights are recognised. Above all, we stress that, just as there are many types of migration, and many facets to development, so there are 'many ageings' (King 2016) which take place biologically, socially, culturally and economically. These multiple diversities within the ageing-migration-development nexus pose ongoing challenges for both scholarly research and policy.

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[i] A scanning of the standard texts on migration and development (Hammar et al. 1997; Skeldon 1997; Van Hear and Sørensen 2003; Lucas 2005; Castles and Delgado Wise 2008; Faist et al. 2011) and of the 150 or so articles thus far published in the journal *Migration and Development* fails to uncover any reference to older migrants as positive actors in the development process.

[ii] Echoing a phrase from the Labour Party manifesto for the UK general election of June 2017, which helped to turn round the Party's fortunes.

[iii] This was the *Gastarbeiter* theory: in practice it worked out somewhat differently, as many guestworkers stayed and 'aged in place' in Germany and other European labour-recruitment countries (Castles et al. 1984).

[iv] Indeed, most of the literature on the phenomenon of family members left behind by migration focuses on the young children of the migrants.

[v] See ONS (2017) Living abroad: migration between Britain and Spain. Available: https://www.ons.gov.uk/peoplepopulationsandcommunity/populationandmigration/internationalmigration/articles/livingabroad/migrationbetweenbritainandspain#how-many-british-citizens-are-there-in-spain (accessed 30 August 2017).

[vi] This focus on pensions should be qualified. In lower-income countries, most people, including especially migrants, work in the informal sector and are not covered by pension schemes (see Barrientos 2009).

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