Near final version of:

A Warnes and A M Williams, 'Older migrants in Europe: an innovative focus for migration studies', *Journal of Ethnic and Migration Studies* v32(8): 1257-81

Older migrants in Europe: an innovative focus for migration studies

Tony Warnes and Allan Williams

Abstract *The paper introduces the eight papers in this collection, all of which arose from the deliberations and research projects of the members of a European Science Foundation Scientific Network. The thematic focus is at the intersection of migration and personal ageing. The paper has three aims and themes, the first being to provide a summary account of the diversity of older migrants in contemporary Europe. A key distinction is between older people who migrate, and the former labour migrants and those who accompanied them who have 'aged in place'. Both groups have attracted innovative research since the early 1990s. Other 'aged migrant trajectories', such as those of return labour migrants and those who move internationally in late-life to live near or with close relatives for support and care, have received much less attention, a lacuna that the present papers begin to correct. The second aim is to synthesise the principal personal, societal and welfare implications of the growing number of 'older migrants' across Europe, emphasising that there are both surprising differences and similarities amongst diverse groups of migrants. Finally, the individual papers will be introduced, but in so doing the design and methodological challenges of research on the variant groups will be drawn out. Seeking to raise understanding of the motivations of migration in old age, and even more of the inter-related consequences of migration and ageing, requires longitudinal, biographical or lifecourse perspectives. While such a research agenda is both stimulating and potentially theoretically and empirically fruitful, it also implies profound practical research challenges.*

Introduction

The eight papers in this special issue on *Older Foreign Migrants* represent an inter-disciplinary field of inquiry that has grown and diversified among European researchers since the early 1990s. The coherence of the field stems from two attributes of the people that it studies: they are elderly or in later life, and international migration has been a significant event at some stage of their lives. At the core are two groups of particular interest: older people who migrate, and younger-adult migrants who have reached old age at their chosen destinations. The term 'later-life' is a better discriminator of the 'populations of interest' than 'elderly people', both because many 'retirement migrations' occur well before the conventional delimiter (65 years) of socially-constructed old age, and because many less-skilled labour migrants experience job-related illness, disabilities or redundancy and cease paid-work in their fifties. The most practical delimiter is over 50 years-of-age, whilst recognising that many migrants in this age group are economically active. As will be elaborated shortly, the focus on 'older migrants' extends beyond the core groups to other types of migration and to different welfare concerns, such as the impacts of large-scale migration on sedentary older people in the areas of emigration and immigration (King and Vullnetari 2006), or the migrations of young adults to provide care for frail and disabled older people, whether on a familial or a commodified basis, including living-in carers and other domestic servants (Socci *et al.* 2003; Van der Geest, Mul and Vermeulen 2004).

In short, the populations and topics of concern are at the meeting ground between two well-established academic and applied fields: migration studies and social gerontology. They clearly require study of the processes of migration (motivations, factors, controls and selectivity), of the immediate and long-term personal, societal and welfare consequences, and of the policy implications. As this collection demonstrates, studies at this intersection bring new perspectives, insights and preoccupations to migration studies. Apart from the high age of the population of interest – when most international migrations are dominated by young adults – the focus on older migrants directs the attention of researchers to different motivations, decision-making processes, and economic, environmental, societal and welfare impacts. Education, training, employment and higher incomes are not the driving forces, although there are overlaps in terms of life-style goals.

Provenance of the papers and companion publications

The authors were members of a *European Science Foundation* Scientific Network on *The Welfare of Older Migrants* which met on six occasions during 2001-03. The network enabled cross-project and cross-disciplinary exchange, led to new investigator teams and some new research, and stimulated the concerted publication of the members' empirical research findings and theoretical debates, including this collection. This network had been preceded by earlier collaboration among several German, Spanish, Swiss and British population and social geographers in the design and execution of their independently-conceived surveys of co-nationals who had migrated for retirement to southern Europe. The network provided an opportunity to set these studies in an inter-disciplinary framework, through the inclusion of anthropologists, sociologists, political scientists and health-services researchers. It also brought together researchers who hitherto had, largely discretely, focussed on particular types of later-life migrant populations.

The present collection focuses on the contributions that the new field is making to the understanding of contemporary migration processes and impacts – on the migrants themselves, on the receiving societies, and on the economies and environments of the destination areas. Other publications arising from the network have been a special issue of *Ageing & Society*, which concentrated on gerontological themes (Friedrich, Kellaher and Torres 2004), and an edited collection published by the *Consejo Superior de Investigaciones Científicas* in Madrid, on the migration of northern Europeans to Spain (Rodríguez, Casado Díaz and Huber 2005). The final report to the ESF includes a directory of research projects, a bibliography and several essays, with the topics ranging from social work with older, disadvantaged Chinese migrants in Rotterdam, to the political economy of the reception of retiree settlement in Andalusia (Warnes 2004). Many of the papers in these three collections are individually cited later in the paper.

Aims and themes

Apart from introducing the collection, this paper reflects on the achievements, directions and current challenges of published research to date. The intention is less to inventory what has and has not been accomplished (the remaining gaps are substantial), but more to react to the emphases and current

directions of the research, and to consider their implications for future research. It will be shown that important influences on the character of the ‘first wave’ of research have been the exigencies of data availability, research funding and feasibility. The majority of older migrants, particularly of the less familiar types, of which more below, are immensely scattered and are not readily identified or located from official sources. Inevitably, the more visible clusters have been the first to be studied.

The introduction will also point up some of the academic returns from studying older migrants. Their situation reveals the long-term welfare and societal implications of mass labour and retirement migration, and has important messages for both migration and social protection policies. And among the migrants are, on the one hand, some of each country’s most disadvantaged, deprived, socially-isolated and socially-excluded older people, and on the other hand, some of the most enterprising and innovative of today’s affluent older people. The groups stimulate the interests of both those with sociological imagination and inquisitiveness, not least in new lifestyles and ‘cultural formations’, and of social and health-care professionals with a responsibility for the welfare of older people.

The paper presents a summary typology of older migrants, partly to dispel the view that they are adequately represented by affluent metropolitan early-retirees who move to high amenity coastal and rural areas, who have been the most prominent subjects in the first wave of research on late-life migrants (Casado-Díaz, Kaiser and Warnes 2004; Warnes *et al.* 2004). That is followed with a discussion of the contrasting driving forces, processes and implications of older and younger people’s migrations, again to reveal the stimulation and challenge to migration research of the shift in focus. The paper continues with several shorter thematic sections, some of which summarise recent contributions to understanding of the new research, while others focus on the social policy and migration policy implications. We begin, however, with a very brief account of the seminal research that linked the interests of migration and gerontology.

Age, mobility and migration

There have been overlaps between migration studies and gerontology for decades. The earliest actively-researched topic was whether an older person’s migration or residential move has negative or

positive personal consequences, even on survival. The first studies, established from 1938, tackled the particular question of whether moves into residential institutions, or between hospitals, brought a mortality risk (Camargo and Preston 1945; Whittier and Williams 1956). The interest generalised to all between-institution moves, including discharges from hospitals to nursing-homes, and then it spread to all moves. By the early 1980s, Pastalan (1983) identified 34 published United States studies and reached 17 conclusions about the factors that influence the outcomes of older people's moves. Ever since, a major concern of acute hospitals in all developed countries has been to improve discharge arrangements, partly to minimise the harmful sequelae for the patients, but increasingly as an element of the hospital management of acute beds, to minimise 'delayed discharge' and the durations of hospital stays.

The conceptualisation soon formed that any migration is a stressful life event with a real risk for survival among frail older people (Coffman 1987). Abstract or theoretical formulations went further, setting the migration experience in a psychosocial framework of personal life-stage adjustment, which involves the acceptance of losses (as of the work role or physical agility), and the optimisation of resources and abilities. This conceptualisation recognises that migration brings stimulation as well as stress. As Kahana and Kahana (1983: 221) put it, 'the total stimulation of anticipating a move, moving and environmental change can benefit those who are under-stimulated relative to their capacities and exhaust the lesser capacities of others ... [which] shows the value of interaction concepts in understanding the gamut of relocation phenomena from [hospital] transfer trauma to eager globetrotting by the "adventurous aged"'.

Another long-standing shared interest has been in the few distinctive international migrations that have involved many elderly people, most of which are 'impelled' or 'forced' migrations of refugees from natural disasters, famines, wars, political oppression and racial enmity. Prominent recent manifestations have included the mass evacuation of Montserrat, 'ethnic cleansing' in the former Yugoslavia, and the substantial emigration of Russian Jews to north America and Israel since 1973, when some aspects of institutionalised Soviet anti-semitism were relaxed, including punitive charges for exit visas. The main themes of the many published studies of the latter dispersal have been the experience and welfare of the migrants in their destination societies (Naon, King and Habib

1993; Hartman and Hartman 1995; Leshem and Shuval 1998; Lowenstein and Katz 2005), although there are accounts of the migration process and its selectivity (Petersen 1975: 691-2).

A third long-established bridging research field has been retirement migration, but until the 1990s it was concerned almost exclusively with internal migrations in European countries, the United States and Australia (for an extensive bibliography, see Walters 2002). The attraction of retired people to coastal resorts and spas was evident even before the railway era, and slowly spread from the very rich down the socio-economic spectrum until, by the 1920s, a mass phenomenon became evident in Europe and the United States, particularly in Belgium, France, England, California and Florida (Gilbert 1939). By the 1970s, retirement migration was well established in human geography research and teaching on both sides of the Atlantic (Cribier 1975; Karn 1977; Warnes 1982; Wiseman 1978). Subsequently, research in the United States has elaborated the associated themes with, for example, a substantial interest in the regional economic stimulation effects of a growing retirement function, and cultural studies critiques of the implicit illusions and denials in the marketing of retirement 'communities' and property (Haas and Serow 1993; McHugh 2003; Longino and Warnes 2005; Serow 2003). The three bridging topics have amply shown that research at the interface of migration and gerontology is mutually stimulating and productive.

The principal groups of older migrants and their migrations

There are several distinguishable categories of 'older migrants' in Europe. Two, polarised 'core' types have already been described. The most evident, relatively affluent retirement migrants, are themselves diverse but include many who epitomise the healthier, more active and innovative of the latest cohorts of Europe's older people. The cohort has attracted the label the 'baby boomers' and the assertions that they are less family-oriented and more concerned with 'quality of life' than their predecessors (Giddens 1991; Murray, Pulman and Rodgers 2003). The term has been imported from north American 'marketing demographics', however, and in Europe the variable histories of fertility and 'modernisation' reduce its validity and have slowed its adoption. Certainly some international retirement migrants are fashioning new lifestyles, activities, roles and patterns of social participation in what they themselves perceive as positive approaches to old age. The cultural, psychosocial and

behavioural transformations are beginning to be documented (O'Reilly 2000a, 2000b; Huber and O'Reilly 2004; Friedrich, Kaiser and Buck 2005). Like all international migrants, they are also taking risks, by moving to countries with different languages, customs, institutions, and social welfare and health-care policies (Ackers and Dwyer 2004). One reason for giving close attention to their situation is that little is yet known about how the decrements of old age – in vigour, health, income and social networks, and the diseases and disorders of advanced age – are shaped by, and shape, people's household and locational situations and migration decisions.

In contrast, most of the second group, labour migrants who have reached old age, settled in the countries of destination during their early-working and child-raising years. They are socially diverse but include those migrants who constituted the mass-migration flows from the 1950s to the 1970s. Many came from depressed rural areas and had relatively little education and few formal or technical job skills. They include some of the most disadvantaged and socially-excluded of western Europe's older people (Brockmann and Fisher 2001; Burholt 2004a, 2004b; Chau and Yu 2000; Yu 2000). This group is markedly heterogeneous, not just in terms of origins and cultural and ethnic characteristics, but also in the extent to which they have raised children and formed social networks at the destination, important factors in their ability both to develop satisfying roles when no longer in work and, should their abilities decline, to turn to informal family and community support (Silveira and Allebeck 2001). There is also considerable diversity in their knowledge of, entitlements to and utilisation of the full range of state income, social housing, social service and health-care benefits and services.

Alongside the two core groups, there are others about which much less is known. The most apparent are 'return migrants', the labour migrants of long residence in western European countries who return to their native countries and regions when they cease work – the 'return of retirement' Cerase (1974). They are themselves diverse, and their migrations constitute a wide continuum that straddles internal and international moves (Cribier 1975, 1981, 2005). In all countries, some who moved to the capital or largest commercial cities of a country from rural provinces return to their native regions when they retire, and some make similar returns across an international boundary.

Only a few of these moves have attracted systematic study and published accounts (Byron and Condon 1996; King 1986; Malcolm 1996). Vicente Rodríguez and Carmen Egea synthesise current understanding and discuss its strengths and limitations in their paper.

Social security and insurance agencies in Germany, the United States and the United Kingdom publish statistics on the number of their clients receiving old-age benefits that are resident in other countries. From this indirect evidence, it is apparent that other types of migration in later life are more voluminous than either amenity-led or return retirement migration (Warnes 2001). For both the Germans and the British, the largest overseas beneficiary populations are in the United States, Canada and Australia. There are many German recipients in Austria, Switzerland and Brazil, and there are many British recipients in Ireland and Germany. The clear inference is that there are substantial flows of family-joining migrants who follow their children's earlier migrations, and that the dispersion is influenced by long-established colonial, economic and overseas settlement connections. While the processes and consequences of family-joining migrations have been studied among recent inter-continental labour migrants into Europe and north America (Min, Moon and Lubben 2005; Moon and Pearl 1991; Pourat *et al.* 1999), the comparable flows out of north west Europe continue to be neglected.

The distinctiveness of later-life migrants and migrations

This section elucidates several distinctive features of older migrants and migrations by making general comparisons between labour migrations, retirement migrations and return migrations (for all three, as seen in Europe from the mid 20th century). The archetypal forms are, for labour migrations, the migrations of young adults from southern and eastern Europe or other continents into northwest Europe, where they have raised their children; for retirement migrations, the movements of affluent couples without others from northern to southern Europe; and the returns of labour migrants to their native or childhood countries and regions, where many have surviving ascendants and same-generation relatives.

The most overt contrast is in the geographical flows, for return migrations broadly reverse the origins and the destinations of labour migrations, although there is evidence of a preference for urban locations in the native regions (Cribier 1981; King 1986). The comparison between the spatial patterns of labour and retirement migrations is less straightforward. By and large, the principal destinations of labour migrations, the larger cities of western Europe, are also the principal origins of retirement migrations (not least because of their relatively high property prices), but the retirees' destinations do not replicate the labour migrants' origins. Instead, they go to high-amenity areas of two kinds: restricted coastal zones, in which they cluster, and rural areas of exceptional landscape value, in which generally they disperse. The Costa del Sol and Tuscany epitomise these two types (King, Warnes and Williams 2000). For both flows, the strongest preferences are for southern, warmer regions and for countries with stable political systems and transparent and effective legal frameworks for the regulation of property transactions.

A schematic summary of the contrasting motivations, beneficiaries, impacts and implications of the three types of migration is presented on Figure 1. To begin with the driving factors, ever since Ravenstein (1885) studied patterns of migration within Great Britain during the third quarter of the 19th century and concluded that migrants move 'to improve themselves in material respects', much has been learnt about migrants and migrations when the motivations and returns have been understood. The 1960s interest in migration decision-making emphasised housing motivations and the triggers of life-stage changes, from marriage to spousal bereavement (Wolpert 1965). A generation later, analysts emphasised the importance of life-style motivations in moves to high-amenity areas (O'Reilly 2000; Gustafson 2001). The motivations and aspirations of the migrants are, however, only part of the picture. For any large flow of international migrants to be sustained, it must produce significant benefits to other parties, from individual employers and land-owners to the national economy, or 'the state'.

As Figure 1 adumbrates, the fundamental non-migrant (or exogenous) drivers of both international labour and retirement migration are international economic relationships and the national economy. Discourses about the liberalisation of migration policy feature both the problematic implications for electoral popularity, community relationships and particular social groups, such as

unskilled workers in the destination settlements, or displaced tenant-smallholders on tourism-retirement littorals, and the counterbalancing potential advantages to the national economy and in particular regions, although the latter are commonly unevenly distributed, both socially and spatially. Beyond this common factor of economic advantage, the principal beneficiaries of sustained labour migrations are employers, while of sustained retirement migrations they are property holders and retail and personal-service providers. It is nonetheless remarkable that in Spain, especially its autonomous island regions, there has apparently been little complaint about, and resistance to, the massive flow of retired northern Europeans to its coasts, except recently on environmental grounds as residential and leisure-resort development have increased their land demands and moved inland. Clearly, the economic benefits, particularly for local property interests, have made the rules, although the impossibility of distinguishing the development demands of mass tourism and retirement settlement confuse the picture.

Another contrast is in the impacts of the migrant's displacement on their close family members in the short and long-terms, matters that are both of great interest to social gerontologists, and which have potentially important implications for welfare policies and provision. An overall assessment is difficult, partly because the personal and familial outcomes are very variable and conditioned by the socio-economic status of the migrants, their parents and children, and by the locations of the family members, and partly because there are still few substantial studies. There is sufficient evidence, however, to reject the assumption for older retirement and return migrants, whether of low- or high-status, that their move to another country implies 'abandonment' of frail parents or hard-pressed children. The forms of reciprocal relationships have changed, as well as the conditions under which these are played out, but they continue to be practised, with occasional long visits, financial transfers and frequent electronic communication substituting for the formerly customary face-to-face engagement and support (Kunemund, Motel-Klingebiel and Kohli 2005; Williams *et al.* 2000).

Transnational residence and lifestyles

The ease and low cost of international travel now means that many older people can exploit, maintain and continue to develop residential opportunities, social networks and welfare entitlements in more than one country. In short, the elaboration of transnational life styles is proceeding faster than our information about their forms. Nonetheless, any migration that takes a person more than, say, 50km from their closest relatives, with whom their lives were formerly closely entwined, disrupts patterns of mutual support and makes instrumental care and support more difficult at times of stress. There are multiplying reports from northern European countries, specifically The Netherlands, Belgium, Norway, Sweden and Switzerland (Ahmadi and Tornstam 1996; Bolzman *et al.* 2004; Hoeksma 2004; Lie 2002; Torres 2004), that long-term international labour migrants who reach retirement have maintained and established links and residences (or residential opportunities) in both their adopted and their origin countries – and some in third countries too. Trans-national activity patterns or ‘time-space use’ have attracted considerable attention from both migration and cultural-change researchers in recent years, but the phenomenon is normally associated with high-achiever young training- and career-oriented individuals. The enabling technological changes, in long-distance travel and telecommunications, are however also manifestly changing older people’s lives (Gilleard and Higgs ###; Katz 2005).

Convincing evidence has recently been published by Poulain and Perrin (2002, Figure 3.6, p. 79) from Belgium’s continuous registration data. They show that many Turks migrate to and from Belgium at all ages, with both the inward and the departure flows showing the ‘adolescent’ and ‘retirement’ transition peaks. Many other long-term labour migrants in retirement ‘shuttle’ at least once a year between the two countries. They have inherited from their distinctive life course the exceptional ‘capital’ for old age of access to both Turkey’s low living costs and Belgium’s superior health and social services. Burholt (2004) has shown similar complexities of time-space use, social networks and financial transfers among aged South Indian labour migrants in Birmingham, England.

Maintaining dual residences (with the help of relatives and friends) enables foreign migrants to maximise their social and family contacts and quality of life, as well as access a broader range of resources. Such trans-national residential patterns are replicated by an increasing number of affluent

northern Europeans who acquire second homes in, and retire to, southern European countries (King, Warnes and Williams 2000; Huber and O'Reilly 2004). Sandra Torres in her paper in this collection refers to other evidence for several recent groups of labour migrants in Sweden.

Migration, ageing and policy

The lower panels of Figure 1 set out the more apparent impacts and policy implications of later-life migrations and show that they contrast greatly with those of labour migration. While the regulation of and responses to migration are prominent in contemporary European social policy discourses, the focus has been mainly on labour migrants, refugees and asylum seekers (Annan 2004; Joppke and Morawaska 2003). By contrast, many of the issues at the intersection of ageing, retirement and migration have been neglected. The great diversity of older migrants has been emphasised, and inevitably the different groups present various and distinctive challenges for policy that encompass not only the more obvious policy arenas of health and welfare (Warnes 2004), but also – in some instances – inter-communal relations, environmental impacts and urban and rural planning. Moreover, the policy responses to these challenges have to be understood in terms of the inter-relation of different levels of governance, from the EU to the local.

Migration and social policies: ageing and deepening contradictions

International migration redistributes both needs and resources, or social and human capital (Friedberg 2000), and is mediated by place-specific cultural and institutional differences. It also involves 'time lags', as migrant populations age *in transit* and *in situ* – with the transitions from being in work to either cessation for reasons of ill health or active early retirement, or the subsequent shift to chronic frailty in late old age. Discourses on migration policy have habitually ignored these temporal dimensions and focussed on immediate and short-term issues, partly because the prevailing view through much of the last half-century was that international migration equated with temporary labour migration. Even if family-unification migration was belatedly recognised, a myth of the labour migrants' mass return survived too long in policy circles. Not surprisingly, then, short-term economic

rather than long-term socio-cultural and health-welfare issues dominated policy debates. There was a failure to look ahead at the consequences of the ageing of migrants.

Yet, in reality, many international labour migrants stay beyond retirement age and until the end of their lives. Moreover, often the accompanying family members were never or only sporadically in paid employment. Some migrants were and are joined by elderly relatives, to whom they were locked in mutual obligations or relationships of care. With the passing years, ageing changed the migrant populations' needs and resources, particularly raising the requirements for income support and health and social care. While the above scenario describes the classic sequence of mass migration to northern Europe, the needs and resources of amenity-led migrants to southern Europe has also changed over time. Early-retired or young-active retired migrants from northern Europe were, at first, seen as a form of long-stay tourism. It was assumed that they would return to their countries of origin in later life, with growing frailty. In reality, and for complex social, economic and cultural reasons, many stayed on, and some have been caught in the unenviable squeeze between diminishing resources (*e.g.* below inflation pension increases) and increasing care needs (King, Warnes and Williams 2000; Hardill *et al.* 2005). Others have returned, or become circular migrants, and divide their time and satisfy their needs in both the origin and destination regions (Breuer 2005; Karisto 2005).

The social welfare of migrants is at all stages conditioned by the intersection of welfare and immigration policies (Jordan and Düvell 2002). Immigration policies determine the status of the migrants, and in combination with their labour market-participation, determine their eligibility to a set of differentiated welfare rights (Dwyer 2000; Ackers and Dwyer 2004). As the national state remains the key agent for determining these policies, across Europe there is inevitably 'a bricolage of territories with differentiated rights for different migrant groups' (Williams 2001: 103). There are some underlying regularities in the patterns of social provision for older populations (Warnes 1999), which not surprisingly follow the broad schemata of European welfare regimes identified by Esping-Andersen (1990).

It is not, of course, simply a question of numbers, because the needs of older migrants are differentiated by nationality, ethnicity and religion. For example, some but not all groups have

language barriers to overcome, and very different cultural norms about personal and bodily care (Cylwik 2002; Gardner 2002). These are real concerns for, as Paul White argues in this issue, ‘to fail to plan for the specific needs of a population sub-group can constitute a form of social exclusion’. But migrants also diversify resources as well as needs (Van der Geest *et al.* 2004). Many older migrants in Southern Europe, for example, have access to far more generous occupational and private pensions than indigenous older people. There may also be different norms of mutual care amongst families, and some older migrants will be able to call on more family support than local older people, while migrant communities can be a source of voluntary self-help initiatives, sometimes organised through the state, religious or other associations. One notable example of this has been the strong involvement of foreign residents in the rapid development on the Costa del Sol of the *Asociación para Cuidados del Cáncer* (CUDECA), which provides advice and care for people with cancer in both the Spanish and expatriate communities (Hunt and Martin 1997). There is a need, therefore, when discussing welfare, to avoid the trap of seeing migrants as passive recipients, for they are active agents – whether individually or collectively – who improve the quality of their lives and shape the policy agenda. Migrants are knowledge carriers and, ultimately, they are the experts on many of the needs of their communities, and can unlock a community’s resources to raise welfare (Hardill *et al.* 2005; Helset, Lauvli and Sandlie 2005).

Sandra Torres, in previous papers (2001) and in this issue, has identified the perverse sequence by which the social- and health-care provider agencies and professionals in a country can move from unpardonable ignorance and neglect of the distinctive needs of older migrants to an over-reaction, one that problematises all such groups because they are migrants and different. The simplicities arise in part from a lack of detailed information about different groups, which again reflects the great difficulty and cost of conducting thorough research on multiple groups, particularly of different languages. It is welcome when older migrants attract the attention of researchers, as a recent spate of German studies suggests (Dietzel-Papakyriakou 2005; Mohammadzadeh and Tempel 2005; Schopf and Naegele 2005), and publications from other northern European countries confirm (Hoeksma 2005; Wurff *et al.* 2004; Bolzman this issue), but simply inventorying needs is but the beginning. Developing appropriate and effective welfare and service responses requires collaboration

between the migrant group and its associations (that are best informed about their needs) and the public service agencies (that have the resources and professional expertise). Detailed research and development work is comparatively rare, although in Britain the *Institute for Jewish Policy Research* has commissioned numerous reports on 'Planning for Jewish Communities' (Valins 2002; see also <http://www.jpr.org.uk/publications.htm>). One senses that social services and community health professionals in a score or more European cities are working from first principles to recognise, assess and respond to the distinctive health and care needs of older migrant communities.

Retirement migration, built form and urban planning

While the most obvious policy implications of international retirement and international retirement migration are in the health and welfare arenas, they also pose challenges for other policy areas, such as spatial planning. They contribute to changes in the built forms in cities and rural areas, mainly through shaping demand for housing (and, to a lesser extent, through requirements for collective facilities). In Northern Europe, this is most clearly evident in the contribution of international migration to inner-city social and economic change and renewal. To some extent, this is paralleled by the impact of retirement migration on property markets in parts of rural France (Hoggart and Buller 1995) and Italy (King, Warnes and Williams 2000). However, their impacts are more starkly evident in many areas of southern Europe where international retirement migration, in conjunction with international tourism, has been the driving force behind the urbanization of many Mediterranean coastal regions.

There are significant and mutually self-reinforcing links between migration and tourism (Williams *et al.* 2000). Tourism facilitates amenity-seeking international retirement, by widening residential search spaces, while retirement migration generates visiting-friends-and-relations tourism. Together they generate significant increases in demand for accommodation in many Mediterranean regions. This has long been recognised in research on the development of coastal resorts, with retirement migration being identified as a means whereby the momentum of property and commercial development of particular tourism areas is extended (Karn 1977; Foster and Murphy 1991; Warnes 1994). The co-presence of tourists and migrants may generate conflicts over congestion, noise and

the night-time economy, and with the passage of time, retirement migrants, whether seasonal or permanent, have tended to move from the main coastal tourism settlements into the hinterlands. Williams and Patterson (1998) traced this process in the Algarve: newly-arrived migrants, and relocating earlier migrants, have bought land or properties in the rural interior of the region, while tourism accommodation remains firmly anchored to the coast.

The spatial organization of the new urban and suburban spaces poses several planning challenges. First, the demand for housing increases prices, which causes difficulties for two other groups, young local residents seeking to establish their own homes, especially if they have not benefited from the boom in the local economy, and labour migrants (often from less developed countries), who provide many of the personal and retail services demanded by the relatively prosperous northern European retirees (Fonseca, Caldeira and Esterves 2002; Salvà-Tomàs 2002). Secondly, the pace of urbanization often outstrips the provision of services, which tend to remain centralised, thereby generating high volumes of traffic on unimproved rural roads. Thirdly, the design and servicing of new suburbs, including in Spain the distinctive *urbanizaciones*, presume that the residents will own and be able to drive cars (Huber 2004). This assumption is, of course, gendered, age-biased and misguided. Fourthly, there are challenges for environmental conservation (including water supplies), as property developers extend urban and suburban areas in often very fragile environments. This is not to say that migration is entirely a negative environmental force. Migrants contribute to local taxes, provide resources for local authority environmental initiatives, and many are leading figures in local conservation movements. The highly variable challenges for local planners depend on local contingencies, the scale and pace of the migration flow, and the attributes of the migrants, not least their age structure (see Casado-Díaz, this issue). However, in all areas of substantial inward retirement migration, there remain significant but little researched issues of social and environmental justice.

Migration, ageing and governance

Where older migrants live influences how their lives are shaped by public policy. Despite the rhetoric of a borderless Social Europe, the significance of the EU in this area is limited. While the EU

Treaties have established rights of mobility and residence, the entitlements are highly differentiated between EU and non-EU nationals, and between those who have worked in other countries and those who settle in a member state after retirement. The result is an uneven patchwork of rights across the EU, which compounds national differences in health and welfare provision. Provisions for different categories of migrants 'bear little relation to demonstrable need but rather reflect the incremental way in which EU social citizenship rights have evolved' (Ackers and Dwyer 2004: 472). This is not to say that the EU has no significance for migrants' lives, even of non-EU citizens. There is an emergent attempt by the EU to harmonise national approaches to refugees and asylum seekers, and other (non-migration) policy initiatives have a direct bearing on older migrants, including the EU role in facilitating low-price air travel through deregulation. However, national differences in migration, welfare and health policies are durable features of life in Europe for international migrants.

This is not, however, to argue that only national governance is significant. Many aspects of everyday life are subject to intervention by the local state, including social housing, the delivery of welfare services, and support for formal associations. Several cities across Europe have responded to the problems and needs of older international migrants, usually in collaboration with, and by supporting, community-based organisations. A leader has been the City of Frankfurt-am-Main, where 'the Office for Multicultural Affairs has addressed the topic of age and migration since the early 1990s. ... Questions of inter-cultural day and inpatient care, home circumstances and the possibility to meet people of the same nationality are all issues that the City takes seriously and supports with dedicated measures' (Frankfurt 2005). The Swiss Red Cross and Red Crescent have given special attention to older migrants (Moser 2002), and with other sponsors established the *Alter und Migration* website in German and Italian for older migrants (see <http://www.alter-migration.ch>). The sensitivity of local administrations to the needs of older migrants varies, of course, and in many places has not overcome the prevailing view that the needs of all older people are the same (Schopf and Naegele 2005).

Even modest interventions can make significant differences to the lives of older migrants. It is therefore encouraging that both public-sector agencies and voluntary organisations are raising awareness and promoting constructive interventions in many parts of Europe. More broadly, the

European Council on Refugees and Exiles has commissioned research on older refugees and the development of good practice proposals (Knapp and Kremla 2002), and the issues are now sufficiently established to have inspired the creation of advocacy and policy discussion bodies in several countries. One of the earliest, the *Policy Research Institute on Ageing and Ethnicity* (PRIAE 2004) in England, has conducted several research studies, some in collaboration with European partners, contributed to numerous national and European policy consultations, and most recently combined with a social housing provider to propose a specialist care facility for Chinese older people. From 2004 it has been participating with comparable Dutch, German and Italian organizations in a EU-funded project on the wellbeing of older women migrants (for details, visit <http://www.ageplus.nl/>).

Comparable responses to disadvantage and the problems of structured exclusion among retirement migrants in southern Europe are less evident but have long foundations in community-based and religious organisations. The British Residents Association in Malta, for example, has been active since the 1950s, and while not exclusively concerned with retirement issues, runs both a welfare surveillance and advice service and a ‘bank’ of mobility aids and other prosthetic equipment. The Royal British Legion has active branches in many parts of Europe (and several have websites), while expatriate German retirees in Spain and Italy have for long been supported by Lutheran church welfare organisations and facilities (Kaiser and Friedrich 2002). Local government responses are more recent and few, but an exceptional initiative, and a model of the provision of relatively low-cost support to older migrants, is the Foreigners’ Department of the Municipality of Mijas (Costa del Sol), which offers a volunteer interpreter service and the translation of official documents for its foreign residents. More generally, most north European retiree migrants in southern Europe have little engagement with local politics (Durán 2004), which adds to their political invisibility and neglect, but in a few places where there are exceptional migrant concentrations, as in Mallorca, Alicante and the Costa del Sol and on the islands of Cyprus and Malta, older migrants have been active in local politics and on occasion been elected to representational roles. They are likely in the future to assume a greater role in local government, which reinforces our earlier argument that they should not be seen as merely passive recipients of public policies formulated elsewhere.

Turning to the broader policy conundrums raised by increasing longevity's implications for social security and social insurance accounts, by the impacts of new medical technologies on health expenditure, and by the spread of neo-liberal views about the appropriate balance of personal and state responsibility, a shift from public to private provision has begun, even in Sweden (Esping-Andersen 1999; Johansson, Sundström and Hassing 2003; Larsson 2006). This lends even greater urgency to understanding how international migration contributes to the distribution of older people's needs and resources across Europe. From around 1945, European social policies were underpinned by an inter-generational social contract that supported pay-as-you-go national social-protection measures. The interests of international migrants are antithetical to and confuse these arrangements, because most divide their tax and insurance contributions among two or more countries or, more generally, fail to accumulate 'complete contributions' in any one country, and then they present their income, welfare and health needs in a country in which they have incomplete entitlements. The positions of those who have not been in the formal labour market, or mainly involved in care-work in the home, are even weaker.

Paradoxically, as the force of the post-1945 inter-generational social contract declines, it could be that the life-long interests of international migrants will be increasingly recognised. If social and migration policies are increasingly framed by the extent to which they promote regional and national economic growth, then so long as there is a full 'social cost-benefit appraisal' of the merits of international migration (whether of labour migrants or retirees), then it will be increasingly understood that to facilitate immigration carries welfare responsibilities and later social costs. Within the European Union, the trend will be asserted by the increasing force of a 'rights' approach to welfare and quality-of-life entitlements (Townsend 2006). Ackers and Dwyer (2002, 2004) have intricately documented the contradictions between, on the one hand, the EU ideals of 'a single labour market', 'freedom of movement' and 'the Social Charter', and on the other, the compromised welfare entitlements of international migrants and their dependants (see Dwyer and Papadimitriou, this issue). Progress in dismantling the structured disadvantages of international migrants will only come, however, if welfare and migration studies reveal and emphasise the medium and long-term welfare consequences of permitted migration, and make the case irrefutably that employers and national

treasuries must provide no less welfare protection to a migrant (and to their dependants) than to a native resident (and their dependants) for equivalent contributions to the economy.

The presented papers and methodological reflections

The majority of the papers in this collection address through a life-course framework various aspects of the situations, residential decisions and prospects of labour migrants who have aged. They are therefore concerned not only with understanding one or more linked migration events, but also the antecedents and long-term consequences in their temporal, geographical and socio-political contexts. As evident from the papers, valuable contributions can be made using a wide range of methodologies, from the analysis of routine official and demographic statistics (White), through policy and document analysis (Torres, Dwyer and Papadimitriou), to in-depth ethnographic approaches (Ganga). The longitudinal or life-course framework raises, however, substantial challenges for research. First of all, there are immense practical problems in identifying and recruiting sub-groups of the population distinguished by two or more life-course events and attributes spread over time. No official source or lists provide a 'sample frame' of labour migrants from country A that have raised children in country B and then returned to A (let alone more complex permutations). In fact, the only way to find respondents is by assiduous and intelligent primary data collection, very often through purposive sampling based on local associations and informants, and by snow-balling outwards from these. Those procedures make the studies vulnerable to charges of 'convenience design' and unrepresentativeness, as compared to quantitative research based on reliable population lists. Individual researchers therefore need to be more rather than less systematic in the collection of such purposive samples, and to be appropriately reflective when drawing inferences and conclusions.

In practice, many projects on older migrants find it difficult to avoid one-sided designs. A study of labour migrants who have remained in the destination country can make only limited comparisons with those who have returned. A recent study of older Irish migrants in London concluded that many of the informants, particularly single men, 'detailed their lives as exiles, unable to return to Ireland and poorly connected to British life. They described a state of disconnection to both worlds. Others have been able to obtain, over time, a relatively contented existence in the UK'

(Leavey, Sembhi and Livingston 2004: 763). Whether those who returned to Ireland felt equally disconnected with their homeland could not be established. Like Bolzman and colleagues in this issue, Leavey *et al.* partially overcame the problem by studying future location preferences and migration intentions, but as ever, those who stay are the most likely to have good reasons for doing so, and those who do not are likely to have the fewest.

By contrast, if the focus is on the circumstances of those who have returned, then comparison with those who remained is unbalanced. The obvious solution, a linked study, has been attempted in a small way by Rodríguez and Egea (this issue), and has produced notably original insights. They show that the push factors associated with the hardships and socially-constricting conditions of Andalusia up to the 1960s continue to influence the way in which the emigrants perceive their native region, their extended family relations and lineage, and the comparative prospects for their children in their native and adopted areas. A substantial study in both origin and destination areas with a good chance of achieving representative samples would however be unusually ambitious, costly and complex. The specific example illustrates broader distortions in research on older migrants. The migration groups that have been studied to date have been selected less because of their predominance or welfare importance, but more because of data availability, visibility, accessibility and the national and service-provision orientations of funding agencies. Most problematic of all, it is always difficult to find and research those who have engaged in failed migrations or returns – whether as labour or retirement migrants.

In the one paper in this collection on amenity-seeking retirement migration to Spain, María Casado-Díaz reports her detailed social research on several nationalities of retirees in one of the more recently favoured coastal towns of Alicante. She had the usual problems of the lack of sample frames and of access to respondents, but revealed aspects of the migration process and of the circumstances of the migrants that had not been uncovered in the earlier and larger surveys on the Costa del Sol and the Canary and Balearic islands (King, Warnes and Williams 1998, 2000; Rodríguez, Fernández-Mayoralas and Rojo 1998; Breuer 2003, 2005; Friedrich, Kaiser and Buck 2005; Huber 2005). More specifically, she was able to show national differences in socio-economic selectivity, motivations and adopted lifestyles. Most obviously, because she was studying a new retirement settlement and the

most recent cohort of north European retirees, she found differences with longer-established settlements and communities. The clear lesson is that with each decade and among successive cohorts of older people, there will not only be new destinations and flows, but we must expect the forms and expressions of retirement preferences and lives to change.

Conclusions

Given the inexorable momentum of contemporary social, economic and political change, most particularly population ageing, increasing international mobility, burgeoning telecommunications, and increasing inequalities in post-work incomes, it appears inevitable that the issues raised in this special issue will have growing importance. Over the last decade, researchers have responded to the need to raise understanding of the issues that we have discussed, and the papers in this collection make further valuable contributions. Given, however, the great difficulties of designing, funding and conducting research on diverse, multi-national, multi-cultural migrants and migrations, it will continue to be difficult to record and understand the changing scene. For all the vigour and immense scale of migration research, the sheer diversity, intricacy and protraction through time of a major migration flow and its consequences can never have been more than partially glimpsed. An interest in older migrants by definition focuses on the long-term consequences for the migrants' quality of life, health and welfare and for the destination societies, and is therefore intrinsically difficult to translate into adequate research.

Research that seeks to widen today's 'partial glimpse' of the processes and outcomes of the intersection of ageing and migration face several other difficulties. First, most older migrants' make residential decisions in relation to larger household and family groups, and these in turn both change over time and condition the wellbeing and welfare implications. There is a need to understand how migration impacts on these wider social groups over the short and long-terms, but as Ganga's paper in this issue makes clear, conducting research on related households is exceptionally demanding. Secondly, the places of origin and destination are constantly being reconstituted, so that any attempt by a migrant to assess the comparative advantage of being resident in old age in the two locations that they think they know can be undermined by political, social and environmental change, as most clearly documented among emigrants from Hong Kong to Europe who have abandoned plans to

return when they retired (Chau and Yu 2000). More generally, the participants in the mass labour migrations of the 1960s and 1970s to northern Europe have difficult decisions to make about the desirability of a 'retirement return' to their native regions, for many have radically changed since they were young. It is no wonder, as the paper in this issue by Bolzman and his colleagues shows, that their preferences and intentions tend over time to shift from 'return' to both 'stay' and 'dual residence'. Thirdly, an understanding of the circumstances and welfare of older migrants requires multi-level analyses of a range of influences, from local associations, through the local state, to the national state and the EU.

Finally, the very nature of migration is changing, posing new challenges for those who will retire in the future. The mass migrations of the latter half of the 20th century are being replaced by increasingly polarised movements. On the one hand, more and more skilled and professional people engage in multiple international migrations through their careers, while on the other hand, there are large flows of relatively unskilled migrants, who are denied formal immigration, employment or residence rights, are employed informally or illegally, and have asylum-seeker or refugee status. These migrants face very different futures in terms of their access to welfare and pension rights.

The difficulties of moving beyond 'a partial glimpse' should not dissuade further research into the processes and outcomes of the intersection between ageing and migration. Most older people in Europe have not undertaken an international migration, nor will this be the case in the foreseeable future. For decades, older migrants will be a minority of European national populations, although as the number of late-life migrants increases, their ability to act collectively and to shape health and welfare policies is likely to increase. Nonetheless, the present tendency to regard them as unusual and responsible for their own situation, as 'other' and of marginal concern, is likely to continue too long. As this paper has attempted to show, Northern European retirement migrants are in the vanguard of profound attitudinal, lifestyle and role changes among older people, while aged labour migrants from Asia and Africa are among the most disadvantaged and excluded of the continent's older people. There are therefore compelling academic and welfare reasons for more research into the many, diverse and fascinating migrant groups in this field.

Acknowledgements

The authors thank the *European Science Foundation* for the grant that enabled the six meetings of the ‘Scientific Network’ on ‘The Welfare of Older Migrants’ during 2001-03, and all the members of the network, for their stimulating contributions to the meetings, and their concerted efforts to exchange and develop understanding.

References

- Ackers, L. and Dwyer, P. (2002) *Senior Citizenship? Retirement Migration and Welfare in the European Union*, Policy, Bristol.
- Ackers, L. and Dwyer, P. (2004) ‘Fixed laws, fluid lives: the citizenship status of post-retirement migrants in the European Union’, *Ageing and Society* 24(3): 451-76.
- Ahmadi, F. and Tornstam, L. (1996) ‘The old flying Dutchmen: shuttling immigrants with double assets’, *Journal of Aging and Identity*, 1, 3, 191-210.
- Annan, K. (2004) *A Europe Open to Well Managed Migration will be Fairer, Richer, Stronger*, Address to the European Parliament, Brussels, 29 January. Press Release SG/SM/9134, United Nations, New York. Available online at <http://www.un.org/>
- Bolzman, C., Poncioni-Derigo, R., Vial, M. and Fibbi, R. (2004) ‘Older labour migrants’ wellbeing in Europe: the case of Switzerland’, *Ageing & Society*, 24(3): 411-30.
- Breuer, T. (2003) ‘Deutsche Rentnerresidenten auf den Kanarischen Inseln’ [‘German retirees living on the Canary Islands’], *Geographische Rundschau*, 55, 44-51.
- Breuer, T. (2005) ‘Alemanes de tercera edad en Canarias’ [‘Germans of the third age in the Canary Islands’], in Rodríguez, V., Casado-Díaz, M.A. and Huber, A. (eds), *Migración internacional de retirados en España [International Retirement Migrants in Spain]*, Consejo Superior de Investigaciones Científicas, Madrid, 263-92.
- Brockmann, M. and Fisher, M. (2001) ‘Older migrants and social care in Austria’, *Journal of European Social Policy*, 11 (4): 353-62.

- Burholt, V. (2004a) 'Transnationalism, economic transfers and families' ties: inter-continental contacts of older Gujaratis, Punjabis and Sylhetis in Birmingham with families abroad', *Ethnic and Racial Studies*, 27 (5): 800-29.
- Burholt, V. (2004b) 'The settlement patterns and residential histories of older Gujaratis, Punjabis and Sylhetis in Birmingham, England', *Ageing & Society*, 24 (3): 383-410.
- Byron, K. and Condon, S. (1996) 'A comparative study of Caribbean return migration from Britain and France: towards a context-dependent explanation', *Transactions, Institute of British Geographers*, 21(1): 91-104.
- Camargo, O. and Preston, G.H. (1945) What happens to patients who are hospitalized for the first time when over 65 years of age. *American Journal of Psychiatry*, 102-68.
- Casado-Díaz, M.A., Kaiser, C. and Warnes, A.M. (2004) 'Northern European retired residents in eight southern European areas: characteristics, motivations and adjustment', *Ageing & Society*, 24 (3): 307-26.
- Cerase, F.P. (1974) Migration and social change: expectations and reality: a study of return migration from the United States to Italy. *International Migration Review*, 8, 245-62.
- Chau, R. and Yu, W.K. 2000. Chinese older people in Britain: double attachment to double detachment. In Warnes, A.M., Warren, L. and Nolan, M. (eds), *Care Services for Later Life: Transformations and Critiques*, Jessica Kingsley, London, 259-72.
- Coffman, T.L. (1987) 'Relocation and relocation stress', in Maddox, G.L. (ed.), *Encyclopedia of Aging*. New York: Springer Publishing Company, 563-4.
- Cribier, F. (1975) 'Retirement migration in France'. In L.A. Kosinksi and R.M. Prothero (eds), *People on the Move*, Methuen, London, 360-73.
- Cribier, F. (1981) 'Changing retirement patterns of the seventies: the example of a generation of Parisian salaried workers', *Ageing & Society*, 1 (1): 51-71.
- Cribier, F. (2005) 'Changes in the experiences of life between two cohorts of Parisian pensioners, born in circa 1907 and 1921', *Ageing & Society*, 25(5): 637-54.
- Cylwik, H. (2002) 'Expectations of inter-generational reciprocity among older Greek Cypriot migrants in London', *Ageing & Society*, 22: 599-613.

- Dietzel-Papakyriakou, M. (2005) 'Potentials of elderly migrants in Germany', *Zeitschrift für Gerontologie und Geriatrie*, 38 (6): 396-406.
- Durán, R. (2004) 'Political involvement of older European migrants in southern Spain', in Warnes, A.M. (ed.), *op. cit.*, 47-50.
- Dwyer, P. (2000) 'Movements to some purpose? An exploration of international retirement migration in the European Union', *Education and Ageing* 15(3): 353-77.
- Esping-Andersen, G. (1990) *The Three Worlds of Welfare Capitalism*. Cambridge: Polity.
- Esping-Andersen, G. (ed.) (1996) *Welfare States in Transition: National Adaptations in Global Economies*. London: Sage.
- Esping-Andersen, G. (1999) *Social Foundations of Post-industrial Economies*. Oxford University Press, New York.
- Fonseca, M.L., Caldeira, M.J. and Esterves, A. (2002) 'New forms of migration into the European south: challenges for citizenship and governance – the Portuguese case', *International Journal of Population Geography*, 8 (2): 135-52.
- Foster, D. M. and Murphy, P. (1991) 'Resort cycle revisited: the retirement connection', *Annals of Tourism Research*, 18: 553-67.
- Frankfurt (2005) *Immigration and Old Age*, City of Frankfurt website. Available online at http://www.stadt-frankfurt.de/amka/english/projects/usuk_projects_age_e2_text.htm#inform
- Friedberg, R. (2000) 'You can't take it with you? Immigrant assimilation and the portability of human capital', *Journal of Labor Economics*, **18**: 221-51.
- Friedrich, K., Kellaher, L. and Torres, S. (eds) (2004) *Older Migrants in Europe*, *Ageing and Society*, special issue, 24(3): 305-475.
- Friedrich, K., Kaiser, C. and Buck, C. (2005) 'Entornos de vida socioespacial y tramas sociales de los emigrantes de retiro alemanes en España: los ejemplos de Mallorca y la Costa Blanca' ['Aspirations and socio-spatial aspects of the ways of life of German migrant retirees in Spain: the examples of Mallorca and the Costa Blanca'], in Rodríguez, V., Casado-Díaz, M.A. and Huber, A. (eds), *Migración internacional de retirados en España [International Retirement Migrants in Spain]*, Consejo Superior de Investigaciones Científicas, Madrid, 241-61.

- Gardner, K. (2002) *Age, Narrative and Migration: the Life Course and Life Histories of Bengali Elders in London*. Oxford: Berg.
- Giddens, A. (1991) *Modernity and Self-Identity: Self and Society in the Late Modern Age*. Cambridge: Polity.
- Gilbert, E.W. (1939) 'The growth of inland and seaside health resorts in England', *Scottish Geographical Magazine*, 55: 21-7.
- Gustafson, P. 2001. 'Retirement migration and transnational lifestyles', *Ageing & Society*, 21, 371-94.
- Haas, W.H. and Serow, W.J. (1993) 'Amenity retirement migration process: a model and preliminary evidence', *The Gerontologist*, 33, 2, 212-20.
- Hardill, I, Spradbery, J., Arnold-Boakes, J. and Marrugat, M. L. (2005) 'Severe health and social care issues among British migrants who retire to Spain', *Ageing & Society* 25(5): 769-83. .
- Hartman, M. and Hartman, H. 1995. 'Long-term effects of international migration: lessons from Israel', *Population Research and Policy Review*, 14(1): 45-69.
- Helset, A., Lauvli, M. and Sandlie, H.C. (2005) 'Jubilados Noruegos en España: perspectivas de una cuarta edad para personas de la tercera edad' ['Norwegian retirees in Spain: anticipations of the fourth age by people in the third age'], in Rodríguez, V., Casado-Díaz, M.A. and Huber, A. (eds), *Migración internacional de retirados en España [International Retirement Migrants in Spain]*, Consejo Superior de Investigaciones Científicas, Madrid, 169-94.
- Hoeksma, J. (2004) 'The care needs of elderly Chinese migrants in Rotterdam', in Warnes, A.M. (ed.), *op. cit.*, 62-5.
- Hoggart, K. and Buller, H. (1995) 'British home owners and housing change in rural France', *Housing Studies* 10(2): 179-198.
- Huber, A. (2004) 'Geographical and ethnographic perspectives on the "rainbow" settlements of the Spanish coast', in Warnes, A.M. (ed.), *op. cit.*, 35-9.
- Huber, A. (2005) 'Retirados Suizos en la Costa Blanca (Provincia de Alicante)' ['Swiss retirees on the Costa Blanca], in Rodríguez, V., Casado-Díaz, M.A. and Huber, A. (eds), *Migración*

- internacional de retirados en España [International Retirement Migrants in Spain]*, Consejo Superior de Investigaciones Científicas, Madrid, 95-119.
- Huber, A. and O'Reilly, K. (2004) 'The construction of *Heimat* under conditions of individualised modernity: Swiss and British elderly migrants in Spain', *Ageing & Society*, 24 (3): 327-52.
- Hunt, J. and Martin, M. (1997) 'Hospice in Spain', in Saunders, C. and Kastenbaum, R. (eds), *Hospice Care on the International Scene*. Springer Publishing Company, New York, 179-89.
- Johansson, L., Sundström, G. and Hassing, L. B. (2003) 'State provision down, offspring's up: the reverse substitution of old-age care in Sweden', *Ageing & Society*, 23 (3): 269-80.
- Joppke, C. and Morawaska, E. (2003) *Towards Assimilation and Citizenship: Immigrants in Liberal States*, Palgrave Macmillan, Basingstoke, Hampshire.
- Jordan, B. and Düvell, F. (2002) *Irregular Migration: the Dilemmas of Transnational Mobility*. Cheltenham: Edward Elgar.
- Kahana, E. and Kahana, B. (1983) 'Environmental continuity, futurity, and adptation of the aged', in Rowles, G.D. and Ohta, R.J. (eds), *Aging and Milieu: Environmental Perspectives on Growing Old*, Academic, New York, 205-28.
- Kaiser, C. and Friedrich, K. (2002) 'Deutsche Senioren unter der Sonne Mallorcas', *Praxis Geographie*, 32 (2): 14-9.
- Karisto, A. (2005) 'Residentes Finlandese de invierno in España', in Rodríguez, V., Casado-Díaz, M.A. and Huber, A. (eds), *Migración internacional de retirados en España [International Retirement Migrants in Spain]*, Consejo Superior de Investigaciones Científicas, Madrid, 197-220.
- Karn, V. A. (1977) *Retiring to the Seaside*, London: Routledge and Kegan Paul, London.
- Katz, S. (2005) *Cultural Aging: Life Course, Lifestyle and Senior Worlds*, Broadview, Peterborough, Ontario, Canada.
- King, R. (1986) *Return Migration and Regional Economic Problems*, London: Croom Helm.
- King, R., Warnes, A.M. and Williams, A.M. (1998) 'International retirement migration in Europe', *International Journal of Population Geography*, 4 (2): 91-112.

- King, R., Warnes, A.M. and Williams, A.M. (2000) *British Retirement Migration to the Mediterranean*. Oxford: Berg.
- King, R. and Vullnetari, J. (2006) 'Orphan pensioners and migrating grandparents: the impact of mass migration on older people in rural Albania', *Ageing & Society* 26 (4): xxx-xx.
- Knapp, A. and Kremla, M. (2002) *Older Refugees in Europe: Survey Results and Key Approaches, and Good Practice in the Reception and Integration of Refugees*, Asylkoordination Österreich, Vienna. Available online at <http://www.ecre.org/publications/old%20gpg.pdf> [Accessed 20 March 2006]
- Kunemund, H., Motel-Klingebiel, A, and Kohli, M. (2005) 'Do intergenerational transfers from elderly parents increase social inequality among their middle-aged children? Evidence from the German Aging Survey', *Journal of Gerontology: Social Sciences* 60 (1): S30-6.
- Larsson, K. (2006) 'Care needs and home-help services for older people in Sweden: does improved functioning account for the reduction in public care?' *Ageing & Society*, 26 (3): 413-54.
- Leavey, G., Sembhi, S. and Livingston, G. (2004) 'Older Irish migrants living in London: identity, loss and return', *Journal of Ethnic and Migration Studies*, 30 (4): 763-79.
- Leshem, E. and Shuval, J.T. (eds) (1998) *Immigration to Israel: Sociological Perspectives*. New Brunswick, New Jersey: Transaction.
- Lie, B. (2002) *Immigration and immigrants 2002*, Statistiske analyser 52, Statistics Norway, Oslo.
- Longino Jr, C.F. and Warnes, A.M. (2005) 'Migration and older people', in Johnson, M. L. (ed.), *Cambridge Encyclopaedia of Ageing*. Cambridge: Cambridge University Press, 538-45.
- Lowenstein, A. and Katz, R. (2005) 'Living arrangements, family solidarity and life satisfaction of two generations of immigrants in Israel', *Ageing & Society* 25(5): 749-67.
- Malcolm, E. (1996) *Elderly Return Migration from Britain to Ireland: A Preliminary Study*, National Council for the Elderly, Dublin.
- McHugh, K.E. (2003) 'Three faces of ageism: society, image and place', *Ageing & Society*, 23, 2, 165-86.

- Min, J.W., Moon, A. and Lubben, J.E. (2005) 'Determinants of psychological distress over time among older Korean immigrants and Non-Hispanic White elders: evidence from a two-wave panel study', *Aging and Mental Health* 9 (3): 210-22.
- Mohammadzadeh, Z. and Tempel, G. (2005) 'Senior migrants in Bremen: demographic structure, social condition and health status', *Gesundheitswesen*, 67 (12): 832-9.
- Moon, J.H. and Pearl, J. (1991) 'Alienation of elderly Korean American immigrants as related to place of residence, gender, age, years of education, time in the US, living with or without children and living with or without spouse', *International Journal of Aging and Human Development*, 32(2): 115-24.
- Moser, H.-B. (2002) *The Challenges of Migration for the Red Cross and Red Crescent Movement*, Statement delivered by Hans-Beat Moser, Swiss Red Cross, at the VIth European Regional Conference of Red Cross and Red Crescent Societies, Berlin, April 14–19, 2002. Available online at <http://www.ifrc.org/meetings/regional/europe/berlin02/hbm140402.asp> [Accessed 20 March 2006].
- Murray, M., Pullman, D. and Rodgers, T.H. (2003) 'Social representations of health and illness among 'baby-boomers' in eastern Canada', *Journal of Health Psychology*, 8 (5): 485-99.
- Naon, D., King, Y. and Habib, J. (1993) 'Resettling elderly Soviet immigrants in Israel: family ties and the housing dilemma', *Journal of Psychology and Judaism* 17(4): 299-313.
- O'Reilly, K. 2000a. *The British on the Costa del Sol: Trans-national Identities and Local Communities*. Routledge, London.
- O'Reilly, K. 2000b. 'Trading intimacy for liberty: British women on the Costa del Sol', in F. Anthias and G. Lazaridis (eds), *Gender and Migration in Southern Europe*. Berg, Oxford, 227-48.
- Pastalan, L. (1983). 'Environmental displacement: a literature reflecting old-person-environment transactions', In G. Rowles and R.J. Ohta (eds), *Aging and Milieu: Environmental Perspectives on Growing Old*, New York: Academic, 189-203.
- Petersen, W. (1975) *Population*, third edition, Macmillan, London.
- Policy Research Institute on Ageing and Ethnicity (PRIAE) (2004) *Proposal for a Chinese Extra-Care Home in London*, PRIAE, Leeds. Available online at <http://www.priac.org/>

- Poulain, M. and Perrin, N. (2002) 'The demographic characteristics of immigrant populations in Belgium', in W. Haug, P. Compton and Y. Courbage (eds.), *The Demographic Characteristics of Immigrant Populations*. Strasbourg: Council of Europe, 57-130.
- Pourat, N., Lubben, J., Wallace, S.P. and Moon, A. (1999) 'Predictors of use of traditional Korean healers among elderly Koreans in Los Angeles', *The Gerontologist* 39 (6): 711-9.
- Ravenstein, E.G. 1885. 'The laws of migration', *Journal of the Royal Statistical Society*, **48**, 167-235.
- Rodríguez, V, Fernández-Mayoralas, G. and Rojo, F. (1998) 'European retirees on the Costa del Sol: a cross-national comparison', *International Journal of Population Geography*, 4, 2: 183-200.
- Rodríguez, V.R., Casado Díaz, M.A. and Huber, A. (eds) (2005) *La Migración de Europeos Retirados en España*, Consejo Superior de Investigaciones Científicas, Madrid.
- Salvà-Tomàs, P. A. (2002) 'Foreign immigration and tourism development in Spain's Balearic Islands', in Hall, M. and Williams, A. M. (eds), *Tourism and Migration: New Relationships between Production and Consumption*, Dordrecht: Kluwer Academic, 119-134.
- Schopf, C. and Naegele, G. (2005) 'Age and ethnicity: an overview', *Zeitschrift für Gerontologie und Geriatrie*, 38 (6): 384-95.
- Serow, W.J. (2003) 'Economic consequences of retiree concentrations: a review of North American studies', *The Gerontologist*, 43, 6, 897-903.
- Silveira, E. and Allebeck, P. (2001) 'Migration, ageing and mental health: an ethnographic study on perceptions of life satisfaction, anxiety and depression in older Somali men in east London', *International Journal of Social Welfare*, 10 (4): 309-20.
- Socci, M., Gabriella, M., Quattrini, S. and Lamura, G. (2003) 'Elderly Care Provided by Foreign Immigrants: Lessons from the Italian Case', *Generations Review*, 13(4): 7-10.
- Torres, S. (2001) 'Understandings of successful aging in the context of migration: the case of Iranian immigrants to Sweden', *Ageing & Society*, 21:3, 333-55.
- Torres, S. (2004) 'Late-in-life immigrants in Sweden: who are they and what do they need? In Warnes, A.M. (ed.), *op. cit.*, 59-62.
- Townsend, P. (2006) 'Policies for the aged in 2005: more 'structured dependency' or the realisation of human rights?' *Ageing & Society*, 26(2): 161-79.

- Valins, O. (2002) *Facing the Future: The Provision of Long-Term Care Facilities for Older Jewish People in the United Kingdom*, Report 1, Institute for Jewish Policy Research, London.
- Van der Geest, S., Mul, A. and Vermeulen, H. (2004) 'Linkages between migration and the care of frail older people: observations from Greece, Ghana and the Netherlands', *Ageing & Society*, 24(3): 431-50.
- Walters, W.H. (2002) 'Later-life migration in the United States: a review of recent research', *Journal of Planning Literature*, 17 (1): 37-66.
- Warnes, A. M. (ed.) (1982) *Geographical Perspectives on the Elderly*. Chichester, Sussex: Wiley.
- Warnes, A. M. (1994) 'Cities and elderly people: recent population and distributional trends', *Urban Studies*, **31**, 4/5: 799-816
- Warnes, A. M. (1999) 'Divided responses to an ageing population: apocalyptic demography, ideology and rational social administration', in Hudson, R. and Williams, A. M. (eds), *Divided Europe: Society and Territory*. London: Sage, 231-54.
- Warnes A.M. (2001) The international dispersal of pensioners from affluent countries. *International Journal of Population Geography* 7(6), 373-88.
- Warnes, A.M. (ed.) 2004, *Older Migrants in Europe: Essays, Projects and Sources*. Sheffield Institute for Studies on Ageing, University of Sheffield.
- Warnes, A.M., Friedrich, K., Kellaheer, L. and Torres, S. (2004) 'The diversity and welfare of older migrants in Europe', *Ageing & Society*, 24 (3): 307-26.
- Whittier, J. and Williams, D. (1956) The coincidence of constancy of mortality figures for aged psychotic patients admitted to state hospital. *Journal of Nervous and Mental Diseases*, 124, 619-20.
- Williams, A. M. (2001) 'New forms of international migration: in search of which Europe', in Wallace, H. (ed.), *Interlocking Dimensions of European Integration*. Basingstoke, Hampshire: Palgrave, 103-121.
- Williams, A. M. and Patterson, G. (1998) 'An empire lost but a province gained: a cohort analysis of British international retirement in the Algarve', *International Journal of Population Geography* 4(2): 113-34.

- Williams, A. M., King R., Warnes, A. M. and Patterson, G. (2000) 'Tourism and retirement migration: new forms of an old relationship in Southern Europe', *Tourism Geographies*, 2(3): 28-49.
- Wiseman, R.F. (1978) *Spatial Aspects of Aging*, Resource Papers for College Geography, Association of American Geographers, Washington DC, 78-4.
- Wolpert, J. (1965) 'Behavioral aspects of the decision to migrate', *Papers and Proceedings of the Regional Science Association*, **15**, 159-69.
- Wurff, F.B. van der, Beekman, A.T.F., Dijkshoorn, H., Spijker, J.A., Smits, C.H.M., Stek, M.L. and Verhoeff, A. (2004) 'Prevalence and risk-factors for depression in elderly Turkish and Moroccan migrants in the Netherlands', *Journal of Affective Disorders*, 83 (1): 33-41.
- Yu, W.K. 2000. *Chinese Older People: A Need for Social Inclusion in Two Communities*. Policy Press, Bristol.

Author details

Tony Warnes is Professor of Social Gerontology at the Sheffield Institute for Studies on Ageing, University of Sheffield.

Email: a.warnes@shef.ac.uk

Allan Williams is Professor of Human Geography and European Studies at the University of Exeter

Email: A.M.Williams@exeter.ac.uk

Aspect	Labour migration	Amenity-led retirement migration	Retirement-returns of labour migrants
Rationale and implications for migrant.	Raise immediate income and life prospects of self and family; escape repressive and stultifying political, social and economic conditions.	Conserve assets (lower standard of living); raise quality of life, partly by developing new activities and interests; improve or protect health.	Conserve assets (lower standard of living); raise quality of life, partly through family relationships (but pluses and minuses and dependent on relatives' locations).
Rationale for receiving country.	Fills job and skills shortages; selectively reduces wage-pressures; generates profits and tax-revenue; stimulates economy.	Inward capital transfers; stimulate construction industry; increase consumption spending; generates profits and tax-take	Inward capital transfers; increases consumption spending; reduce load on public-sector care of frail older people.
Main beneficiaries (apart from the migrants).	Employers, entrepreneurs, share holders, the state (public finances), landlords of rented housing.	Land owners, real-estate industry, building companies, retail and personal services providers; local government in favoured areas (property and sales taxes).	Family farms and enterprises; building companies, local government (property and sales taxes); surviving parents, especially if frail; inheritors.
Implications for ascendants.	Some receive remittances; lose proximity, interaction, practical help, care, affirmation and emotional support; possibly rejection of way of life and values. .	Reduced proximity, interaction, practical help and care, affirmation and emotional support.	In some cases, regained proximity, interaction, practical help and care, affirmation and emotional support
Implications for descendants.	Born and/or raised in different cultural setting; mixed and hybrid identities and language.	Lose proximity and interaction, including practical help and care, affirmation and emotional support (dependent on locations).	Lose proximity and interaction (giving and receiving), including practical help, care, affirmation and emotional support (dependent on locations).
Community, economic and environment impacts.	Destinations concentrated in large cities, where in-migrants change ethnic or cultural composition of neighbourhoods, settlements and regions.	Destinations <i>either</i> coastal clusters, where migrants can transform the ethnic composition, <i>or</i> dispersed in rural areas of declining population (readily absorbed). Urbanisation and water-demand impacts can be severe.	Destinations highly dispersed, and significant impact only in areas of extreme population loss and farm abandonment. Flows generally too small to create major environmental impacts.
Welfare implications and policy issues.	Many groups multiply disadvantaged by low education, income, language skills and social security entitlements, and by discrimination; need to eradicate discrimination and combat xenophobia.	Not entitled to many old-age welfare benefits and services (those with contributions or residence qualification); excluded from some care services by language, cultural differences and discrimination.	Not entitled to some old-age welfare benefits and services (those with contributions or residence qualification). Returnees may 'import' welfare-service expectations and increase demands on local agencies.

Figure 1. The motivations, rationale and impacts of three archetypal migrant and migration groups.