



# Migration and development: The overlooked roles of older people and ageing

Progress in Human Geography  
2022, Vol. 46(4) 1009–1027  
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DOI: 10.1177/03091325221090535  
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**Tanja Bastia**   
University of Manchester, UK

**Aija Lulle**  
Loughborough University, UK

**Russell King**  
University of Sussex, UK

## Abstract

Discussions on migration and development geography have both suffered from ‘ageism’: an overwhelming preoccupation with children and the young in the latter and widespread assumptions that migrants are generally young adults, who only leave behind children in the former. It is unsurprising, then, that migration-development debates have also been biased in favour of the young. In this paper we consider the place of older people and of ageing as a process in migration and development debates. We argue that older people, thus far overlooked, are also involved in migration and development, in heterogeneous ways and in different geographical contexts. While doing this, we challenge the conventional view of older migrants as inactive and vulnerable and of older people as merely recipients of development interventions. We argue that experiences of ageing and global inequalities are increasingly entwined and demonstrate this through five dimensions of migration and development debates: remittances, diasporas, return migration, international retirement migration, and intergenerational care. Older people and ageing as a process are central to each one of these dimensions, and it is imperative to pave further research of heterogeneity of ageing within contexts of global inequality. (189 words)

## Keywords

ageing, migration, development geography, intergenerational care, remittances, return

## 1 Introduction

Our overall aim in this paper is to highlight the need to bring older people and the process of ageing into debates on migration and development. Nearly 20 years ago [Nyberg-Sørensen et al. \(2002\)](#) proposed the ‘*migration–development nexus*’ as a framework

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### Corresponding author:

Tanja Bastia, The University of Manchester, 1.064, Arthur Lewis Building, Oxford Road, Manchester M13 9PL, UK.

Email: [Tanja.Bastia@Manchester.ac.uk](mailto:Tanja.Bastia@Manchester.ac.uk)

for analysing the mutually constitutive relationship between international migration and development. More recent scholarship has explored the contrasting theoretical interpretations of this nexus and pointed to a wealth of empirical evidence, which demonstrates a variety of outcomes in terms of inequality and social difference (Bastia and Skeldon, 2020; De Haas, 2010; Delgado Wise and Covarrubias, 2009; Faist, 2008; Faist et al., 2011; Gamlen, 2014; King, 2018; Piper, 2009; Raghuram, 2009).

However, we find that in terms of age as a marker of social difference, migration and development debates have been heavily skewed towards younger people. This is not surprising, given that both the migration and the development literatures have traditionally given preference to younger generations. While there has been some exploration of the ways in which ageing and life courses as vital process are linked to development (Bailey, 2009; Wright, 2012), much of the focus of both development interventions and development-related research has been on younger adults and children. Older people are routinely overlooked in discussions on development, including policy initiatives. When included, they are generally portrayed as recipients of development interventions (Lloyd-Sherlock, 2004; Randel et al., 1999; Vera-Sanso, 2016).

The migration literature has likewise been mainly focused on the migration of younger adults. In other parts of the literature; however, there has been work done in developing an understanding of the relationship between ageing and migration or what is called the '*ageing–migration nexus*' (Lulle and King, 2016: 5; see also King et al., 2017), including (non) return experiences (Hunter, 2011, 2018a; Sampaio et al., 2018) and transnational home-making practices (Walsh and Näre, 2016). Despite the fact that most of this literature has focused on experiences of ageing and migration in higher-income countries, we draw on it to help us unpack the role that older people play in migration and development and how ageing as a process is relevant for migration and development debates. In this paper, we therefore put into dialogue the ageing and migration literature with that on migration and development, to come to a better understanding of the role that older people play in migration and development and how a consideration

of the process of ageing can enrich our understanding of migration and development debates.

We argue that it is imperative that the current predominant focus on the younger generations in migration and development debates is addressed, given the rapid ageing of the global population, particularly in the global South, as well as the many ways in which older people are involved in migration processes – both as migrants and as 'stayers' – and thereby, also, in development. Although much of what we discuss in this paper is also relevant for movement within country borders, or internal migration, we here focus on international migration, or movements across international borders, given that most of the migration and development debates deal with this type of migration. While recognising that internal migration is at least as important as international migration, including for development, we cannot do justice to all types of movements in a single paper.

We therefore use the current focus on international migration to build a framework for better understanding the role that older people play in migration and development processes and for the importance of understanding the process of ageing for migration and development debates, extending the work that was already begun by (King and Lulle, 2020). Our core contribution is to demonstrate how ageing intertwines with migration and development relations against the backdrop of diverse inequalities in the world and among population groups.

Migration and development debates have traditionally encompassed four key areas of interest: (i) the role played by remittances in promoting development; (ii) how diasporas engage in the development of their countries and communities of origin; (iii) the ways in which return migration can contribute to development, through the transfer of knowledge and skills to countries of origin; (iv) how skilled migration may have detrimental effects on the development of the migrants' countries of origin. While normative approaches to migration and development might begin from the assumption that migration can and does promote development of countries of origin, more critical perspectives would suggest that migration might in fact contribute to the development of countries of destination (i.e. those

that are already better off). This is something we discuss in more detail in the next section. Of importance here, is that in this paper we use the first three of these traditional areas of interest in migration and development debates as a starting point to, first, build a more comprehensive migration–development framework and, second, develop our analysis of the role that older adults and ageing as a process play in migration and development.

Our framework therefore focuses on the role that older adults play in remittance sending; the developmental implications of ageing diasporas; and how ageing migrants relate to return. We subsume discussions of skilled migration in all three of these sections, making particular reference to how migrants with access to more or less skilled jobs have differentiated access to pensions and social security benefits and the implications of this for remittances and return. To the three areas identified above, we add transnational care and the retirement industry, which we consider is likely to grow in scope in the years to come.

Our account is structured in the following way. In the next section, we discuss the migration and development literature in more detail and also clarify what we mean by ‘ageing’, ‘migration’ and ‘development’. We also include a discussion of global trends of ageing, with special reference to the global South, as this provides the justification for why there is now a critical need for including ageing in discussions of migration and development. We then discuss these five dimensions of migration and development. The conclusion highlights some policy issues and future research challenges.

## II Ageing, migration and development

The term ‘migration and development nexus’ was coined by [Nyberg-Sørensen et al. \(2002\)](#) to describe the complex relationship between migration and development, in an attempt to better understand the complex interdependencies and two-way causalities embedded in the relationships between migration and development processes ([Bastia and Skeldon, 2020](#); [Faist et al., 2011](#); [Skeldon, 1997](#)). However, interest in migration as a potential source for development and economic growth goes back to the large Italian

migration from the South of Italy to the US at the end of the nineteenth and beginning of the twentieth century ([Foerster, 1919](#)). The initial interest, particularly from policy-makers, focused on how development (here understood as direct development assistance) might decrease migration from lower- to higher-income countries, particularly to Europe and the US. But this quickly turned into a realisation that the migration–development relationship is actually positive, and not negative as policy-makers had hoped: that is, greater development often leads to more migration ([Clist and Restelli, 2021](#); [De Haas, 2005](#)). In a more nuanced way, [De Haas \(2020: 18, 26\)](#) describes the relationship between migration and development as ‘non-linear... reciprocal, but asymmetric’. He understands migration as a sub-process of development, dependent upon, or an intrinsic part of, broader development conditions.

In this most recent wave of interest in migration and development, which we trace to the turn of the present century, the relationship between migration and development started gaining increased interest in both academic circles and the policy arena (UN High Level Dialogue on Migration and Development, from 2006; the Global Forum on Migration and Development, from 2007). The increased visibility of these debates has also led to migration being much more tightly integrated as a development-relevant process in the Sustainable Development Goals (2015–2030), than in its predecessors, the Millennium Development Goals (2000–2015).

In his critique of the migration–development nexus, [Faist \(2008\)](#) warns that, even though, since the 1990s, social capital, co-development and remittances became celebrated categories after decades of discourses and practices to ‘help’ the poorest, the reality is that the migration–development nexus operates through powerful states and capital-holders and continues to oppress the poorest. In the meantime, on an individual level, migration is based on geographical inequalities and does not necessarily reduce inequality ([Black et al., 2006](#)). This line of argument is further developed by [Delgado Wise and Covarrubias \(2009\)](#), who see migration not as a potential contributor to home-country development but as an ongoing symptom of those countries’ underdevelopment and as a means of cementing their

position on the vulnerable margins of the global capitalist system. For these authors, 'migration' and 'development' are antithetical concepts, locked in a vicious cycle of the reproduction of underdevelopment and global inequalities. Thus, Escobar's (1995: 10) sharp diagnosis of development as a power system, comprising also the knowledge and subjectivities through which people see themselves as developed or not, is as relevant in current debates in a rapidly ageing world as it was almost three decades ago.

As already mentioned in the introduction, most of the discussions about migration and development tend to focus on younger generations. There is an assumption that those who migrate are younger adults and, in this literature, there is little recognition that these migrants will eventually age, which will have implications for how they relate to remittances, return or their relationship with other members of their diasporas. When the 'left behind' are considered, in both policy and research circles, there has also been an overwhelming concern with the children that migrants leave behind, less so with the migrants' parents, while transnational intergenerational relations are only slowly gaining some ground in more dedicated research circles focusing on ageing and migration (Baldassar et al., 2007; Yarris, 2017). However, we argue that this needs to change, given that the current century will be defined by demographic ageing (Skinner et al., 2018: 9).

Although in many parts of the global North ageing had been a key feature of population change for several decades before the end of the previous century, rapid ageing in medium- and low-income countries will be the defining feature of this century (Phillips and Feng, 2018; Rishworth and Elliott, 2018). Over 1.5 billion people – more than double the current number – will be aged 65+ and older in 2050. The most significant increase is expected in East and South-East Asia, reaching 573 million persons aged 65+. In contrast, the fastest growth of older people is projected in North Africa and West Asia, reaching 96 million, respectively. The next most rapid rise is expected in sub-Saharan Africa, reaching 101 million in 2050 (UNDESA, 2019: 5-6). In the world's largest population, China, the number of people aged 65+ is expected to grow from 164.5

million in 2019 to 365.6 million in 2050 (ibid: 45). Overall, more than two-thirds of the world's older population – 1.1 billion – will live in developing countries by 2050, while the fastest increase (by 225%) will occur in the least developed countries, where it is projected that 120 million persons will be aged 65+ (ibid). These changes beg for new migration and development thinking against the background of concurrent growing global inequalities.

Ageing can be defined as the biological process of becoming older; but the ageing process and 'becoming an older person' are very much geographically emplaced, culturally constructed and politically shaped. Currently, declining fertility rates, closely linked to higher levels of development and urbanisation, are the main demographic drivers for global ageing (Phillips and Feng, 2018: 96–97). Extensive reviews already exist about the geography of ageing (Harper and Laws, 1995; Skinner et al., 2015, 2018). These show that we still know relatively little about ageing in the global South, although there is a growing literature by anthropologists and gerontologists (e.g. Coe, 2017; Kreager and Schröder-Butterfill, 2007; Vera-Sanso, 2006, 2012; Yarris, 2017).

Rather than defining an older person through a fixed age threshold such as 60 or 65, we see ageing as an ongoing process which typically starts in middle-age with the consciousness of older age approaching. A distinction between 'third' and 'fourth' age is relevant here (Ahmed and Hall, 2016; Williams et al., 2012). The former is usually the stage, frequently covered by lifestyle research and targeted by policies and individual choices, of 'active' and 'successful' ageing. The latter is the frail old-age of bodily and/or mental decline (Higgs and Gilleard, 2017), when health concerns may prompt return to a place where regular healthcare and familial support is available. The migration literature refers to the 'salmon bias' when older international migrants with deteriorating health choose to return to their place of origin to access this support (Wallace and Kulu, 2014). Where this is not possible, ageing may lead to isolation and immobility in a context of ageing 'in place' (Hunter, 2011).

This awareness of death and approaching frail state in life, perhaps having also seen the decline and

death of contemporaries, can be an important stimulus to initiate migration in later life. In the words of a North American retiree in Cuenca, Ecuador, it is important 'to get into other cultures' after having 'had enough of death and dying for a while' (quoted in Hayes, 2021: 1228). However, 'active ageing' is not always an option due to social differences such as class or health. Moreover, these – some would argue 'Western'-centric – models of individual responsibility and independence, which celebrate 'active' ageing, do not necessarily map on to all societies in the global South where, in some contexts, 'successful ageing' is less about individual self-reliance and more about dignity, respect, family support, spiritual development and physical relaxation (Gamburd, 2021; Gardner, 2002). Migration, therefore, takes place between societies where different models of ageing and older-age are in place (Andrews and Philips, 2005).

In this paper we are mainly concerned with international migration. We understand migration as the movement of a person or people from one place or country to another, succeeded by their presence in that place/country for a certain threshold of time, such as 6 months or 1 year (De Haas et al., 2020: 23–25; Hammar and Tamas, 1997: 16). But cross-cutting this time-based technical definition, we fundamentally see migration as a process, with migrants 'located in networks, relationships and communities' (O'Reilly, 2012: 4), one which profoundly changes the world, for both the migrants themselves as well the societies they move from, through and to.

Migration itself takes on an increasing variety of different forms, including seasonal and circular migration, return migration, retirement and lifestyle migration, family-joining migration, and many more. Whilst the rapid ageing that is currently taking place in countries of the global South is mainly seen as a combined result of increasing longevity and a falling birth rate, these are also often regions of high aspirations to migrate (Carling, 2002; Carling and Schewel, 2018). This has implications for population ageing, as youth emigration hastens the demographic transition by removing not only a significant fraction of the young-adult cohorts, but also their current and future reproductive potential.

Of relevance to our discussion is the relatively large discrepancy between the types of migration that are usually the focus of academic research and policy reports, which give the impression that migration from the global South to the global North is the predominant form of migration; and the reality of migratory movements, almost half of which (some would argue more) take place between countries of the global South (between 34 and 41% of all cross-border movements, depending on which source is used; IOM, 2013). Clearly, both migration and ageing take place in a world that is highly unequal and within or between countries that are often described as having achieved a higher or lower level of 'development'.

In this paper we take a broad view of development: one that includes the historical process of social and economic change, and not just direct development action/assistance; and also one that destabilises traditional understandings of lower-income countries being in need of development (see Hart, 2004; Mawdsley and Taggart, 2021). Recent debates have challenged the supposed 'location' of development and proposed a paradigm shift from international to global relational development (Horner, 2020). With the rise of the BRIC countries and the shifting position of China in the global political scene has also come a blurring of distinctions between 'developed' and 'developing' or 'less-developed'.

Development is also a dynamic concept. It implies a positive change in society – growth and advancement, yes, but combined with redistribution of resources, and principles of egalitarianism and individual empowerment (Lewis, 2019; Sinatti and Horst, 2015). Horner (2020: 416) calls on geographers to move beyond the broad brush of a North–South divide, and recognise inequalities in-between countries and regions. Moreover, the post-socialist bloc sits uneasily in this division. On a global scale, the asymmetry between population growth and capital accumulation is stark: populations continue ageing and now declining in high-income countries, which concentrate the world's economic wealth, while expanding demographic prognoses apply for the African continent, hosting some of the lowest-income countries (Bloom, 2020).

Having discussed our main understanding of migration and development debates, as well as the importance of ageing in a world that is increasingly mobile and unequal, we now move to the main part of the paper, where we focus on five key spaces that are, in our view, critical for integrating the process of ageing and the role that older people play in the relationship between migration and development. The first three form part of the ‘classical’ migration-development debates: remittances, diasporas and return migration. We then add two additional spaces of critical engagement: the development implications of the international retirement industry, and transnational care in contexts of global uneven development, specifically towards older stayers and movers. We use this framework in two ways. First, to highlight the importance of transnational care and the retirement industry for migration and development debates, thereby expanding the classical definition of the migration-development nexus. Second, to highlight the role that older people and ageing as a process play in all five dimensions of this nexus.

### III Older migrants and remittances

Remittances are generally acknowledged to be the most important pillar of most migration and development debates. These financial transfers made between individuals, generally from richer to poorer countries, can constitute a larger share of direct financial transfers than overseas development assistance or foreign direct investment (see e.g. [Barne and Pirlea, 2019](#)). Remittances have been shown to be highly resilient to financial downturns, and while they are often not spent on the ‘small-business investments’ preferred by policy-makers, they generally go towards significantly improving the standard of living of the recipients. They are often used to improve housing, pay for children’s education, buy more nutritious food or pay for medicines. At the same time, heterogeneity of migration and development outcomes can work in the opposite direction: remittances and return migration can increase inequality at individual, family and local scales ([Bastia, 2013: 11](#); [Black et al., 2006: 1](#); [Lipton, 1980](#)).

While a large literature exists about remittances, exploring different types of transfers, including

social remittances (‘the ideas, behaviours, identities and social capital that flow from receiving- to sending-country communities’ – [Levitt, 1998: 927](#)), as well as some attention paid to the gender dimension of remittance sending and receiving ([Vullnetari and King, 2011](#)), relatively little has been said about the age of those sending or receiving remittances, with notable exception of [Hunter’s \(2018a\)](#) detailed work. He has demonstrated that older migrants organise community-level projects, such as West Africans investing remittances in agriculture, including transnational managing a tractor purchase in Belgium and its shipment to Mauritania.

Where migrants migrate to, combined with the types of jobs they can access, will have important implications for whether they can retire and access some financial support in later life and therefore, potentially, continue to remit. Data for 2014 and 2015 from [UNDESA \(2017: 50-51\)](#) show that more than 95% of people above retirement age in Europe receive some sort of pension, compared to only 23% in Sub-Saharan Africa. When individual countries are examined, the discrepancies are even more marked, also within regions: less than 10% pension coverage in Guatemala, yet nearly 70% in Costa Rica. And whilst in East and South-East Asia the coverage is 69%, it is only 26% in South and Central Asia. A large proportion of the labour force in lower- and middle-income countries works in the informal sector; hence they cannot draw work-based pensions. Statutory age-based pensions are not available or too low to cover even the basic necessities ([Barrientos, 2009](#)). Because of such low levels of support, most older people in lower-income countries need to continue working. In addition, some nationalities of migrants are able to access pensions, while others cannot ([Sinatti, 2015](#)).

Inequality among migrant types is therefore crucial: professional migrants will usually be able to support their older age with private pensions and some of these might be sent to their remaining families in their countries of origin. However, it is also likely that those who ‘age in place’ will have spent a large part of their life in their destination countries, with weakened connections to families

and communities of origin. As we know, time spent abroad is inversely related to the amount and frequency of remittances sent.

Remittances are not just sent, they are also received. Some of those who receive remittances will be older members of the migrants' families. While parents who remain in the country of origin when their adult children migrate are often seen as vulnerable and needing care, many are actually active participants in their children's migration projects, particularly while they are still healthy and able to lead active lives. As Bastia et al. (2021) have shown, migrants' parents can sponsor their children's migration, which can be seen as a form of 'reverse remittance' (Mazzucato, 2011). In addition, once their children find jobs abroad, the parents who stayed in the country of origin can play a key role both as receivers of those remittances as well as managers of how the money is spent, overseeing investment projects, or the building of their children's homes. Given that many parents also have significant caring responsibilities towards grandchildren, they may use the remittances to cover their grandchildren's expenses, such as food, clothes or schooling (Yarris, 2017). Many grandparents also end up financially supporting their grandchildren, even when the grandchildren's parents do not send any money (Bastia et al., 2021). In this context, they are effectively saving their children the cost of remitting, enabling the savings earned through migration to be invested in other projects.

#### **IV Ageing diasporas and transnational communities**

Like remittances, diasporas were for a long time also thought of as a quintessential 'migration and development' topic. Diasporas, originally defined as an exiled group of people and their descendants with a shared identity and common descent (Cohen, 2008), were seen as playing an important role in organising and channelling resources to the migrants' countries of origin. The term embraces both migrants and their multi-generation descendants or a group of people who live outside of their country of birth and identify, at some level, with one another

and their homeland; but we also recognise their heterogeneity.

Usually, the heterogeneity that is recognised in diasporas and transnational communities is related to gender, class, education or citizenship status. Rarely is there a recognition of ageing also being part of how diasporas and transnational communities change over time. Some studies do exist though. These show that the process of ageing for 'diasporic elders' is unequal depending on where they reside, despite the fact that they have some common ground and a shared country of origin (see the contributions in Mehta and Singh, 2008). Others, such as Lamb (2009), show how ageing as a process is highly heterogeneous and how older people play an active role in creating the structures and practices that contribute to changing ageing cultures. At the same time, the authors also question the validity of romantic notions of an idyllic past, in which inter-generational families coexisted in harmony. Näre (2017) is one of the few researchers who engage with the question on how ageing and diasporic identities are co-constructed. Studying Gujaratis in London, she highlights ambivalences in the elders' sense of belonging and how they construct notions of home transnationally, through seasonal mobility between their 'original' home in Gujarat, India and their 'other' home in London.

In terms of transnational labour communities, some countries set up schemes to support the retirement plans of their citizens abroad, as the Philippines does, but not everyone is able to benefit (see Go, 2012: 18–21 for the overview). The Philippines has a long history of labour migration to many parts of the world. Those who went abroad as young and early-middle-age workers are now approaching, or are beyond retirement age. This country's labour export model contains a social security system through which Filipinos who have emigrated can voluntarily contribute to a pension scheme in preparation for their return. Whilst some have returned (or will return) on retirement, others are 'trapped' abroad, especially those who are working in the informal sector and with no social protection or pension rights. Nazareno et al. (2014) have studied Filipina careworkers in Los Angeles and found many of them looking after elderly and frail Americans

who were actually younger than them. They argue that the result is that the 'unretireable elderly' care for the 'retired elderly'. At the same time, the Philippines is attracting more wealthy returnees from other countries via the retiree visa system (Philippine Retirement Authority, 2018), thereby creating new ageing transnational communities in global South (see section below).

Meanwhile, in Europe, many labour migrants 'aged in place' because they have been abroad for so long that they hardly 'know' their countries of origin. On the whole, the evidence from Europe partially challenges the 'double jeopardy' hypothesis (cf. Dowd and Bengston, 1978) of being both a migrant and an older person. Elderly migrants may face welfare inequalities compared the native populations of the host countries, but they are better off in these respects than they would be if they had returned to their countries of origin (Hunter, 2018b: 204). This conclusion is vindicated by research on Cypriot and Bangladeshi migrants in London (see Cylwik, 2002 and Gardner, 2002 respectively). On the other hand, Hunter's (2011) research on African older migrant men who continue to live alone in migrant hostels after they have retired in France, rather than return to their families in their home countries, speaks to a more problematic old age for these workers. They live largely estranged from their families, mainly in order to avail themselves of the higher pensions, which are conditional on them being resident in France, and to access a better standard of free healthcare.

Incorporating understanding of older migrants' needs in a broader migrant and development thinking is crucial because older migrants who age 'in place' are likely to have an increased need of care and greater reliance on the welfare system (pensions, subsidies, care support) of the country of destination. Their retirement status might give them more time, and possibly more resources, to dedicate to development interventions in their communities of origin, but this will only last whilst older migrants are still healthy and able to contribute to such projects. The years spent away from their country of origin might also have weakened their association with it (Hunter, 2011; Stewart et al., 2019), which would make people more likely to invest their time and resources

locally, rather than in their country of origin. However, unless older migrants are well-integrated into local social networks and communities, they may end up spending their later lives in solitude and isolation, as many non-migrants do. However, only limited literature exists thus far that examines older migrants' development potential in terms of civic participation, such as volunteering in co-ethnic or cross-ethnic communities (for review, see Torres and Serrat, 2019).

## V Ageing return migrants and their development potential

The conventional economic view of older and retired migrants is that, wherever they are, they are a 'cost': their productive years have passed and so, rather than being a net contributor to the economy through their labour and taxes, they are a burden. They are seen as 'taking out' of the fiscal system and perceived as a drain on the health service. Countries in the Gulf region require their immigrant workers, both professional 'expats' and low-skilled labourers, to leave the country once they are no longer working (Damir-Geilsdort and Pelican, 2019). Most other countries are not so ruthless, recognising both the economic rights of tax-payers to stay on after retirement, and the social and humanitarian rights relating to family life, community cohesion and personal choice of where to live in retirement.

In an early intervention, based on migrants returning from the US to the south of Italy, Cerase (1974) wrote about the 'return of retirement' as having little development potential, unlike the 'return of innovation' which took place when migrants were younger and economically active. And yet, older returnees can be a stimulus to development. First, even if the returnees' wish is indeed to live out their retirement years quietly in their 'native air' and remain economically inactive, there are still some positive economic effects derived from the inflow of their pensions, which boost the local economy. Transfer of pensions is a complex, multilateral process, which unequally shapes older people's possibilities of return and investment in their country of birth. Purchasing power of fully transferable pensions can be a strong instrument for development



if they are fully transferable (Hunter, 2018a: 111). But this does not work for everyone: for instance, UK pensions are not always upwardly adjusted for inflation if the recipient is resident outside the EU. Or Cape Verdean migrants can return with pensions earned abroad, but this is not the case for Senegalese returnees (Sinatti, 2015).

If returnees spend some of their savings on house-building or renovation, again this mostly circulates into the local construction, repair and maintenance sectors, which employ local people. Some older migrants return with a more active later life in mind, whether it be a sense of personal or professional pride, which they could not satisfy in a country of immigration (see Gullbekk Markussen, 2020 in case of Somali returnees from Norway). Sun's (2014, 2016) research on older, highly skilled Taiwanese returning from the United States reveals a dual motivation of privileged migrants to move back to Taiwan: to access good-quality, affordable health-care, and to contribute to the development of their home country. For the latter developmental effect, some of the main ideas in Sun's analysis are 'altruistic economics' and 'professional remittances'. Following their 'official' retirement from their US careers, they start a new, later-life career in Taiwan, bringing back their specialist knowledge and experience, social capital, and new ways of thinking acquired over long residence and work in the US. They work especially in universities, research institutes, hospitals, private companies and consultancies. According to Sun (2016), they have made considerable impacts in these areas. However, the same returnees also face problems, such as resistance to their 'modernising' ambitions, and being categorised as 'American' Taiwanese, who are unfair users of the healthcare system compared to 'locals', who earned health support through their continuous tax contributions (Sun, 2014: 541).

Many countries have specific policies to encourage their migrants to return, regardless of their age, since even retired migrants are likely to transfer their pensions and savings as a valuable form of foreign exchange. For instance, studies of return migration in Africa show that some migrant-sending countries, such as Cape Verde, Côte d'Ivoire, Ghana and Senegal, are promoting return, at least of the

highly skilled, who are seen, sometimes too optimistically, as 'agents of development' (Åkesson and Eriksson Baaz, 2015; Ammassari, 2009). Such studies also record retirees and semi-retirees amongst the return flows: if they are able to bring financial capital they can become investors, innovators and developers, whilst also enjoying a higher quality of life (good housing, domestic help, etc.) due to low local wages. Notable is the return of mature-age established male migrants to Ghana, who became 'big men' in their communities (Kleist, 2015).

## VI International retirement migration

A fourth link between migration, ageing and development lies in the field of international retirement migration, a largely privileged form of migration whereby relatively wealthy people in higher-income countries seek out attractive locations to enjoy their retirement years. The international dimension of retirement migration developed from the mass tourism boom that started in the 1960s and 1970s, resulting in many Northern Europeans purchasing retirement properties in Southern Europe in subsequent decades. The fact that these retirees spent longer than a 'holiday' period in these properties led some to term this type of migration as 'residential tourism' (Jurdao Arrones, 1970; Huete et al., 2008).

The template for European North-to-South retirement migration has been the settlement of large numbers of British, German, Dutch and Scandinavian retirees along the Spanish Mediterranean coasts over the past 30–40 years. Apart from the weather and scenery, other 'pull factors' for this older-age migration have been cheaper housing and living costs and, for some, the existence of already-established communities of co-nationals (Casado-Díaz et al., 2004; King et al., 2000). This type of migration offered 'a place in the sun' (Williams et al., 1997) for retirees from Northern Europe and an economic development stimulus for some of these formerly impoverished areas in the South of Spain. However, it also displaced large numbers of farm workers from the land they used to cultivate (Jurdao Arrones, 1970). Many have raised concerns about the land speculation that went hand-in-hand with this type of development, which lacked both urban and

tourism planning (Huete et al., 2008). Others have highlighted the irreversible damage to the local environment and increased social segregation between the local and the migrant communities (Membrado Tena, 2015). While this type of development has also created jobs, attracting younger Spanish internal migrants (Huete et al., 2008), many are critical of the lack of planning and lack of an alternative vision for the future of the Southern Spanish coasts.

The more accessible tourism that has supported this type of development in Spain and elsewhere in Mediterranean Europe has in recent years expanded to the global scale. As a result, we are now seeing a somewhat similar pattern of retirement migration emerging in Latin America and Asia: in Latin America, principally Mexico (Balslev Clausen and Velazquez Garcia, 2011; Sunil et al., 2007; Truly, 2002), Ecuador (Hayes, 2014, 2015) and Costa Rica (Janoschka, 2011; Janoschka and Haas, 2014), and in South-East Asia, mainly Thailand (Botterill, 2017; Koch-Schulte, 2011; Toyota and Xiang, 2012). A key issue is how certain places and regions become selected or promote themselves as destinations for 'Northern' retirees. Janoschka and Haas (2014), who argue against the term 'retirement migration', and prefer 'lifestyle migration' (because people of all ages move to seek a better life), describe how these developments are targeted strategically to boost economic development in places that lack alternative sources of development. They document how the consumption of places and natural landscapes contributes to the process of individualisation, social distinction and identity production. Janoschka (2011) further analyses the negative effects of increased house-building for foreign 'lifestyle migrants' on the local population, who cannot afford to be part of this type of urban development and who are as a result excluded from drawing any benefits from this process of urbanisation, except some low-status employment opportunities. However, he also describes how these residential tourists can become allies in the protection of the environment in protest movements that cut across nationalities and migration status.

Other research has focused more closely on the social consequences of retirement/lifestyle migration. Botterill (2017: 9-10), Maher and Lafferty (2014: 443) and Scuzzarello (2020), in their studies in Thailand,

emphasise that meshing intersectional gender roles, the masculinity of Western men and their seeming privilege is far from a smooth process. If ageing Westerners do not have transnational capital on their own, they can find themselves in a precarious situation in Thailand. Koch-Schulte (2011) and Scuzzarello (2020) highlight the tensions inherent in cross-national marriages between older Western men and younger Thai women (see also Rudman, 2006).

It is worth pointing out that US retirees in Latin America often choose their southward move because they can hardly survive on their pensions at home, and could not afford the very high costs of privatised healthcare there (Hayes, 2014). Likewise, retired North Europeans in Thailand are often 'pension-poor' and, amongst other reasons, including a personal history of tourism there, or marriage to a local woman, relocate to resorts such as Chang Mai because of low living costs, a benign climate, and an existing infrastructure for accommodating foreign retirees (Botterill, 2017).

The most sophisticated analysis of the development implications of North-South retirement migration comes from Hayes' research on North American retirees in the historic city of Cuenca in the Ecuadorian Andes (Hayes, 2014, 2015, 2018a, 2018b, 2021). He introduces the term 'geographic arbitrage' (or 'geoarbitrage'), which consists of relocating day-to-day living expenses to low-cost destinations; put another way, the 'outsourcing of retirement' (Hayes, 2014). Given that most of the retirees receive only modest pensions, they define themselves as 'economic refugees'. By retiring to Cuenca, they are able to achieve three important later-life ambitions: maintain and enhance material living standards; engage in energetic age-related lifestyles not possible in North America; and enjoy lower-cost living in an architecturally attractive Spanish colonial-style urban setting (Hayes, 2014). While most retirees interviewed by Hayes saw their impact on the local economy as positive, the benefits of this expenditure are far from equally distributed, since the largest payments, relating to property rents and purchases, go into the pockets of the local landowning elite, a point also raised for both Costa Rica (Janoschka, 2011) and Spain (Huete et al., 2008). The result is the creation of distortions in

the transformed moral economy and increased inequalities of a city undergoing transnational gentrification (Hayes, 2018b). Likewise in San Miguel de Allende in Mexico, like Cuenca a UNESCO World Heritage city, North American lifestyle retirees create economic asymmetries which, according to Fernández (2011: 26), should be tackled through public debates involving the local inhabitants.

What of the future? As Gould (2015: 251) notes, the UN's conservative and linear ideas of development imply that the Western type of development will spread globally. It is likely that North–South retirement migration will also spread and its effects become more globalised but also spatially specific to those countries and places that can offer the required services, prices and security. From Northern and Western Europe, the geographies of international retirement migration have extended to include nearby 'frontiers' in Morocco, Turkey and Bulgaria (King et al., 2021). In Eastern Asia, Japanese retirees, already an established presence in Thailand, are also moving to Malaysia, the Philippines and Indonesia (Toyota and Xiang, 2012). However, such ideas of global development must be addressed critically and take into account questions raised by those working from a postcolonial framework. We should also pay attention to similar patterns being replicated through internal migration (Chen, 2020). Further ahead, rapid ageing in the global South, in the context of growing developmental inequalities there, may set up new international retirement flows within this heterogeneous world region.

## VII Intergenerational care in the context of migration and global uneven development: older people as stayers

The migrations of recent decades from the poorer countries of the world have mainly been of young adults. These people often migrate on their own and leave their children behind in the care of family members. The older generations – the parents and, in some cases, the grandparents – often end up with significant caring responsibilities towards the left-behind young children (Bastia, 2009; Yarris, 2017). With the passage of time, the direction of travel of care-needs changes: children grow up and the migrants' parents age and develop care

requirements of their own. Had this migration not taken place, their younger relatives would have helped take care of ageing parents and enable them to 'retire' within the social space of the multi-generational family (see Kuuire et al., 2016 on Ghana; Lie (2010) about Chinese and Bangladeshi households in the UK); albeit in many contexts this familial care does not happen or is eroded, as research in Brazil (Biehl, 2005) and West Africa (Green and Lawson, 2011) has shown.

Transnational care 'cuts across' social policies, services and families that can no longer be perceived within frameworks of methodological nationalism (Wimmer and Glick Schiller, 2002; Horn and Schweppe, 2017: 335; Horn et al., 2013: 7). In some contexts, the migrants' parents suffer from immobility and isolation as a result of the migration of their younger household members (Ciobanu and Hunter, 2017), a problem that is reaching global proportions. It has been studied for instance in Europe and Australia (Baldassar et al., 2007), and in China and other parts of Asia, in the context of both international and long-distance internal migration (Biao, 2007; Congzhi and Jingzhong, 2014; Da, 2003; Knodel and Saengtienchai, 2007; Toyota et al., 2007). Researching the generational incidence of poverty and migration in Albania, King and Vullnetari (2006) propagated the term 'orphan pensioners' for these semi-abandoned older generations. Their precarious situation is exacerbated by low levels of pension support, insufficient to cover basic needs, forcing such older people into lives of frugality and privation (Vullnetari and King, 2008). In many cases, older people must continue to cultivate the land for subsistence or engage in other informal work practices to survive. Poor healthcare systems, especially in rural areas, and the lack of care homes for older citizens, leave the orphan pensioners increasingly vulnerable as they age. On top of their economic marginalisation, orphan pensioners also suffer extreme loneliness, especially if all their children have moved away and are unable or unwilling to visit. Such isolation, often in remote and depopulating villages where most services have closed down, is also common in other countries, including Bolivia (Bastia et al., 2021), Bulgaria (Conkova et al., 2019; Iossifova, 2020) and China (Congzhi and Jingzhong, 2014).

Sometimes these difficulties can be mitigated if migrants have migrated close by, allowing more frequent contact as in the case between 'East' and 'West' Europe where high-emigration countries such as Poland have been recently studied (Conkova and King, 2019). In other cases, and where rules on visa allocation and older-generation family reunion allow, grandparents might join their adult children at destination, through 'follow-the-children migration'. In this scenario, the multi-generation family is re-composed in the migration destination setting (Da, 2003; King et al., 2014). Such arrangements generate mixed results. Grandparents can feel 'wanted' and are able to gain the satisfaction of giving as well as receiving care within the family. They also have access to better healthcare than they would have back 'home'. But they may suffer from social isolation outside the family setting and be dependent on their children for financial support. Cross-generational tensions may arise because of different attitudes to bringing up children.

While older migrants try to navigate through multi-level care arrangements between macro (state-provision) structures, families and social networks (Ciobanu et al., 2017), the failure of transnational care arrangements might break down when the necessary conditions for mobility fail, due to declining health or changes to visa regimes. As indicated above, this could be an individual challenge, due to age, disposition and life course, but it might also structurally not be available to large sections of the population because of socio-economic inequalities. This is likely to be more difficult for poorer people, who cannot access basic resources such as health services or communication technologies. Communities depopulated and demographically unbalanced by large-scale out migration will not be in a good position to cope with increasing numbers of frail, isolated and immobile older people (Conkova et al., 2019; Iossifova, 2020).

## VIII Conclusion and ways forward

While population ageing is our inevitable future (Coleman, 2001), longevity cannot be expected to last indefinitely and may stabilise or even decline in developing countries (Leon et al., 2019). In any case

scenario, ageing must be brought into migration and development perspectives to better understand the relationship between migration and development, the role played by older generations in these processes and the implication that population ageing has for our understanding of migration and development.

In this paper we have provided new thinking in development geography by highlighting the role played by older people and the importance of the process of ageing in the five dimensions of migration and development we examined. We have challenged the label of vulnerability often applied to ageing migrants and stressed that people who are at or approaching the end of their working lives are not necessarily economically inactive or geographically immobile. At the same time, we should be careful not to impose the standard bipolar lens of origin and destination to migration, nor to assume the superiority of the Western neoliberal model of active ageing. Whilst many older migrants wish to settle down to a relatively sedentary old age, either in their destination setting where they will 'age in place', perhaps supported and surrounded by children and grandchildren, or back in the 'native soil' of their country of origin, for others a pattern of transnational mobility is their favoured choice. Free of the shackles of work, they can keep in touch with family and friends in two or more places and be involved in intergenerational care exchange across borders. But the ability to be transnationally mobile is not accorded to all older migrants. Three factors structure their access to international movement, creating new dimensions of inequality: health status, the financial ability to pay for travel, and visa regimes. If it can be activated and sustained during 'third age', transnational mobility between 'here' and 'there', with frequent contact with dispersed family members, is seen as desirable, and an important component of ageing migrants' wellbeing. If such mobility is blocked, for whatever reason, the result tends to be loneliness and physical separation from loved ones, in addition to other problems of frailness and 'ill-being'. Where it is enabled or encouraged, as we have seen in the phenomenon of international retirement migration, it raises questions as to the type of development that ensues.

In thinking about ageing, migration and development, several themes emerge that need to be considered for future research. Shifting global geographies of the distribution of ageing populations and of ongoing and possible future migration trends (notably, due to climate changes too) will inevitably direct attention to the global South, as we have indicated at the beginning of this paper. Given the lack of pension coverage and deficient healthcare, especially in rural areas, a major developmental challenge will be how to cater to the needs of this increasingly ageing population.

Especially in Africa, Latin America, South and South-East Asia, and in the low- and medium-income parts of the global East, older people will be differentially, and in most cases negatively, affected by the various challenges relating to (under) development, especially those which are sudden and unforeseen, such as food shortages, public health crises and climate disasters. We know that during and after emergency situations, older persons are generally more vulnerable due to their reduced mobility, fewer resources and diminished sensory awareness of the risks involved (Phillips and Feng, 2018). This is even more obviously the case with the COVID-19 pandemic, given the much higher mortality rate experienced by older people.

Pension rights and their transferability across borders are an issue of particular interest to more privileged migrants, especially those who exercise the tactics of ‘geoarbitrage’ and shift themselves and their pensions to low-cost destinations. As we have shown, some pensions are easily transferable, others less so. Nevertheless, a growing phenomenon in North America, Europe and Japan is for pensioners to seek cheaper, yet safe destinations in low-income countries, where retirement, living and healthcare can be ‘outsourced’ (Toyota and Xiang, 2012). It is likely that the ‘search field’ for amenable locations in Latin America, Africa and South-East Asia will expand. For older migrants from low-income countries, pensions are even more important for their livelihood and wellbeing, along with the issue of adequate social security and healthcare financing for returned migrants (Rishworth and Elliott, 2018: 110). Likewise, global social protection policies, and especially the sustainability of national healthcare

systems, is a serious question for future research on ageing, migration and development (see Coe, 2017; Sun, 2014; Toyota and Thang, 2017).

### Declaration of conflicting interests

The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

### Funding

The author(s) disclosed receipt of the following financial support for the research, authorship, and/or publication of this article: Tanja Bastia’s time to work on this article was supported by Leverhulme Trust; Research Fellowship RF-2016-450.

### ORCID iD

Tanja Bastia  <https://orcid.org/0000-0002-2025-7706>

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### Author biographies

**Tanja Bastia** is Professor at the Global Development Institute, University of Manchester. She teaches international development and writes about gender, migration and development.

**Aija Lulle** is Senior lecturer at Loughborough University, UK and Senior Researcher at the University of Finland. Her main interests are related to geography and lifecourse, lived experiences of ageing intergenerationally and imagination of ageing futures.

**Russell King** is Professor of Geography at the University of Sussex and Visiting Professor in Migration Studies at Malmo University. He has long-standing interests in all forms of migration and their relationships with development and other social and economic processes.