Workshop 24 - Cross-border Second Home Ownership

Retirement migration from northern Europe to tourist areas in Spain

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Retirement migration from northern Europe to tourist areas in Spain

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Abstract: Since the 1960s, large numbers of North European retirees have acquired second homes, or settled on a more permanent basis, in tourist areas in Spain. This phenomenon involves several interesting features – social structures and norms developed within the retiree communities, modes of cultural adaptation, complex relationships between tourism and migration, cross-national residential strategies, and so forth. The present paper examines retirement migration from northern Europe to Spain from the perspective of migration studies, using a transnational approach. Most previous studies of migrant transnationalism have investigated the migration of workers or refugees. But in what ways and to what extent is transnationalism present in this form of retirement migration? On the one hand, relatively strong transnational characteristics are observed with regard to mobility, identities, social networks and cultural practices. On the other hand, political transnationalism is much less developed and economic transnationalism is rather indirect. These patterns reflect, in important respects, the migrants’ position as relatively privileged retirees.

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Introduction

Research and theorizing on migrant transnationalism have thus far mainly concerned migration from South to North by workers and, to some extent, refugees. In a recent paper, Leichtman (2005) suggests that studies of South-to-South migration may be a useful complement, and studies by Conradson and Latham (2005) and others on ‘transnational urbanism’ have drawn attention to upper- and middle-class migration within the ‘North’. The present paper adds to these efforts to extend the field of transnational studies, by applying the transnational perspective to retirement migration from northern Europe to Spain.

The purpose is to examine to what extent and in what ways retirement migration in this case can be described as transnational, and to compare the transnational elements present in retirement migration with previous research on transnationalism in South-to-North labour and refugee migration. To begin with, I review the transnational perspective in migration research and some discussions that have accompanied the emergence of this perspective, and suggest a number of analytical dimensions of transnationalism. After a brief general description of international retirement migration to Spain, I use these analytical dimensions to map the presence (or absence) of transnational characteristics in retirement migration from northern Europe to Spain. For this mapping I employ data from my own research on Swedish retirees in Spain, complemented by studies of retirement migration from Britain and Norway. Then follows a summary that compares retirement migration with previous research on migrant transnationalism, and some concluding points about possible implications of this comparison.

Dimensions of transnationalism

During the past ten or fifteen years, migration scholars have observed that international migrants often, and seemingly to an increasing extent, retain substantial bonds with their countries of origin (Glick Schiller et al. 1992; Basch et al. 1994; Pries 1999; Vertovec 1999). They produce and reproduce practices and relations that connect the sending and receiving societies. They often also develop identities that refer to more than one place or nation-state. In the frequently quoted definition introduced by Basch et al. (1994, p. 22), transnationalism represents ‘a process by which migrants, through their daily life activities and social, economic, and political relations, create social fields that cross national boundaries’.

In subsequent research the concept of transnationalism has been used to designate a wide range of empirical phenomena that make up such ‘social fields’. Transnationalism thus includes migrants’ border-crossing practices and relations, and the activities and institutions that emerge in sending and/or receiving societies as a consequence of such practices and
relations. It also includes the influence that such practices and relations have on identities, life projects and ‘horizons of expectations’ – of migrants, but sometimes also of others who have social contacts with migrants or live in communities that are strongly marked by migration.

Some early writings tended towards very clear-cut definitions and delimitations of transnationalism, implying that either a migration movement, or a set of migrant practices, was transnational, or it was not (e.g. Portes et al. 1999). However, these attempts have been criticized (Al-Ali and Koser 2002; Waldinger and Fitzgerald 2004), and the theoretical premise for this paper is a more inclusive approach. It assumes that transnational elements are observable in most if not all migratory movements, but to varying extent and in various ways.

Another contested issue concerns the relationship between transnationalism and immigrant incorporation into the receiving societies. Early proponents of the transnational perspective suggested that transnationalism might replace earlier modes of immigrant incorporation, especially assimilation (e.g. Portes et al. 1999, pp. 228-9). However, several studies indicate that those migrants who are most involved in organized transnational activities often also appear to be well integrated in the receiving societies (Basch et al. 1994). It has therefore been suggested that transnationalism may be regarded as ‘one possible variant of assimilation’ (Kivisto 2001, p. 571) or that transnationalism may ‘cross-cut’ assimilation and segregation (Faist 2004, pp. 30-1). This discussion points further towards the issue of the long-term viability of transnationalism (Vertovec 2001). Will transnationalism persist over several generations, as Basch and her colleagues (1994) argue, or is it, as for example Kivisto (2001) seems to suggest, a temporary phenomenon that will disappear as the second or third generation assimilates into the new home country? As this paper will show, these questions take a different and theoretically interesting turn in the context of international retirement migration.

Several theorists have suggested analytical dimensions or forms of transnationalism. In their previously quoted definition, Basch et al. (1994) mention social, economic and political relations, together with migrants’ ‘daily life activities’. Pries (1996) suggests four analytical dimensions of ‘transnational social spaces’: political-legal frames, material infrastructure, social structures and institutions, and identities and life projects. Portes et al. (1999) suggest a typology of economic, political and socio-cultural transnationalism, whereas Vertovec (1999) discusses transnationalism as a social morphology, a type of consciousness, a mode of cultural reproduction, an avenue of capital, a site of political engagement, and as the (re)construction of ‘place’ or locality.
Such dimensions may not always be clearly discernible in empirical studies, as one empirical phenomenon may involve two or more dimensions. Yet a set of dimensions may still be analytically useful as a tool for systematic consideration, mapping and comparison of transnational aspects of a migration movement. Based on the different conceptualizations above, and with additional inspiration from some of my previous research (Gustafson 2001; 2002a), I will use the following six dimensions of transnationalism as broad thematic foci in this paper:

- **Mobility**: practices and patterns of mobility between sending and receiving countries, in particular repeated travelling, that makes migration an ongoing process rather than a one-time event, and that enables migrants to uphold cross-border practices and relations.

- **Identity and belonging**: individual and collective identities and feelings of belonging, referring to both sending and receiving countries, to localities in both countries, or to social and cultural formations (some would say ‘transnational communities’) produced by migration between the countries in question.

- **Social networks and social structures**: social relations among migrants and between migrants and their relatives and friends in the sending societies; social norms emerging within such relations (e.g. concerning reciprocity and solidarity); the import that such relations and norms have in the everyday life of migrants and, not least, for subsequent migration.

- **Cultural practices and institutions**: cultural flows between sending and receiving societies caused by migration, the presence and practicing (due to migration) of cultural expressions from one country in another country, especially when this takes an organized or institutionalized form; new cultural expressions shaped by such flows (‘hybrid cultures’); migrant organizations and their role in these processes.

- **Politics and legislation**: border-crossing political participation and activism by migrants, aimed at influencing the politics of sending and/or receiving states; legislation and political initiatives concerning migrants and migration, especially sending country policies directed towards emigrants.

- **Economic activities and exchanges**: capital transfers and other economic activities, caused by migration, that connect sending and receiving countries, including individual migrants’ remittances and investments, organized fund-raising, and ‘ethnic’ businesses emerging as a consequence of migration.
The theoretical position reflected in the use of these analytical dimensions is, once again, that most if not all forms of migration give rise to some transnational connections and activities, but that their contents and scope may look different for different migration movements. Some forms of migration are more transnational than others. They are more transnational if migrants’ cross-border practices and relations are frequent, if such practices and relations are performed by a large proportion of an immigrant group, if they are reproduced over time, if they are routinized, organized or institutionalized, and if they have substantial implications for the migrants involved and for sending as well as receiving societies.

I will now turn to one specific case – retirement migration from northern Europe to Spain. After a brief general description, I will use the six analytical dimensions for examining the presence or absence of transnational characteristics in this form of migration, and compare them with previous research on migrant transnationalism.

Retirement migration to Spain
The migration of retirees from northern Europe to the Mediterranean is largely a consequence of tourism. As mass tourism took off in the 1960s, visitors very soon started to acquire their own residences in (or near) the tourist areas. In particular, many older persons have chosen to move, permanently or on a seasonal basis, to the Mediterranean when they retire (King et al. 2000; Källström 2003). Spain is the most popular country, with substantial populations of foreign retirees living on Costa del Sol, Costa Blanca, the Canaries and the Balearic Islands. The largest numbers of migrants come from Britain and Germany, but considerable migration has also occurred from other North European countries such as the Netherlands, Belgium, Switzerland and the Nordic countries (Rodríguez et al. 1998; King et al. 2000; O’Reilly 2000). The present paper is based on studies of retirement migration from Sweden, Norway and Britain.

Available data suggest that the migrants are predominantly former managers, professionals, entrepreneurs and employers (e.g. Rodríguez et al. 1998; Helset et al. 2004, pp. 51-2), although O’Reilly also found several persons with working-class background (2000, pp. 17-22). However, exact quantitative data on foreign retirees living in Spain are impossible to give, for two main reasons. First, retirement migration to Spain involves a continuum of mobility stretching from prolonged tourist visits through seasonal migration to permanent residence, with a wide variety of migratory and residential arrangements. Second, many migrants do not register as Spanish residents, so formal population statistics and various
informal estimations of the numbers of foreign residents in Spain differ widely (O’Reilly 2000, pp. 44-59; Helset et al. 2004, pp. 31-7). As an illustration, the 2001 Spanish census registered 94,000 British, 8,600 Swedish and 5,800 Norwegian residents (INE 2005), whereas a recent Swedish handbook for migrants to Spain claims, without giving any source, that around 500,000 ‘Englishmen’, 75,000 Swedes and 50,000 Norwegians live in Spain ‘for longer periods of time’ (Källström 2003, p. 10).

The individual motives behind migration mainly concern climate and economic advantages (King et al. 2000, pp. 93-6; Helset et al. 2004, pp. 61-5). The pleasurable climate, especially during the winters, permits a more attractive lifestyle, including outdoor activities as well as relaxation. The climate is also related to health issues, as some retired migrants suffer from health problems that are substantially reduced in a warmer climate (Helset 2000; Gustafson 2001). Economic motives for migration involve lower living costs and sometimes fiscal advantages.

On a structural level, the increasing numbers of older persons who retire abroad can probably be explained by social, economic and demographic developments – increasing longevity, earlier retirement, higher incomes and assets among retirees, changes in attitudes and lifestyle preferences, and more widespread working-life experiences of travelling and living abroad. Legal and institutional developments within the European Union have also facilitated intra-European retirement migration (King et al. 2000, pp. 1-32; Helset et al. 2004).

Some previous writings have referred to migration from northern Europe to Spain as ‘transnational’, but with no systematic references to the literature on transnationalism (O’Reilly 2000; Gustafson 2001). This paper is an attempt to examine, using the analytical framework outlined above, in what ways and to what extent retirement migration to Spain displays transnational characteristics.

For this purpose, I will first use my own research on seasonal retirement migration between Sweden and Spain (cf. Gustafson 2001; 2002a; 2002b). My empirical data consist of semi-structured interviews, made in 1999, with 46 Swedish retirees (22 married or cohabiting couples and two persons living alone). The main purpose of the original study was to examine experiences of seasonal migration, so all interviewees except for one couple had residences in both Sweden and Spain and spent at least three months per year in each country. Chain referral sampling was used, and I tried to obtain some variation in the sample with regard to age, reasons for migration, residential history in Spain, lifestyle in Spain, and time spent in Spain each year. In addition to these interviews, my data also include handbooks for Swedish
migrants in Spain and some newspaper and Internet material. Second, I will complement my own data with a review of previous research on retirement migration to Spain, mainly from Britain and Norway. The migration from these two countries is relatively well documented in studies by O’Reilly and by King and his colleagues on British migration, and by Helset and her colleagues on migration from Norway.

Foreign retirees in Spain are not a homogenous group, but differ along several dimensions – national origin, social background, length and permanence of residence in Spain, orientation towards Spain and the country of origin, and so forth (Rodríguez et al. 1998; O’Reilly 2000; Casado-Díaz et al. 2004). For the purpose of the present paper, however, I will focus more on common characteristics than on variation between different groups of migrants.

Mobility
A central claim in the literature on transnationalism is that migration should not be regarded as a one-time, permanent move but as a continuing process. Research on transnationalism shows that migration often involves repeated moves and travel between sending and receiving countries (long- and short-term stays, return visits, etc.), and that such mobility is often of vital importance for developing and maintaining transnational ties (Basch et al. 1994; Portes et al. 1999). Continuous mobility may have several, sometimes interacting, reasons such as social obligations, emotional ties, economic or political activities, opportunities with regard to work or studies and, not least, a desire to maintain a base in the sending country in case of an eventual return. Improved infrastructures for mobility and communication are often described as an important factor behind the increasing significance of transnationalism.

Retirement migration from northern Europe to Spain also displays highly diverse and flexible forms of mobility (Gustafson 2001). A typology suggested by O’Reilly (2000, pp. 52-9), based on different patterns of residence and mobility, distinguishes four different categories of migrants: full residents, who regard themselves as permanent residents in Spain and do not consider ever returning to their previous home country; returning residents, who are registered as legal residents in Spain and live there most of the time, but spend a few months, mainly during the summers, in their country of origin; seasonal visitors, who spend less than six months each year in Spain and hence are not officially registered; and finally peripatetic visitors, a diverse category of people who own second homes in Spain which they visit more or less regularly.

In O’Reilly’s study the majority of the retirees could be placed in either the ‘returning residents’ or the ‘seasonal visitors’ category, and also retired ‘full residents’ often made short-
term visits to Britain. Many foreign retirees in Spain also own houses or apartments in their northern European home countries and move between them and their Spanish homes in highly flexible ways, although mainly on a seasonal basis (Helset et al. 2004). In my interviews it was clear that the retiree communities at some places, especially Gran Canaria, were strongly marked by a rhythm of seasonal migration. King et al. (2000, pp. 111, 157-8) report that the majority of their Costa del Sol respondents spent most of the year in Spain, but made frequent return visits to Britain.

Several different factors contribute to these mobility patterns. To begin with, large-scale tourism brings about excellent infrastructures for mobility. Low-price air travel is easily available, especially after the deregulation of the charter traffic. Because of their retirement, the migrants’ mobility is not constrained by work obligations, and this gives room for what King et al. describe as ‘residential amenity maximisation’ (2000, p. 110) – enjoying the warm winters in Spain and avoiding the very hot Spanish summers. Another important reason for returning from Spain is the desire to spend time and maintain relationships with friends and relatives, especially children and grandchildren. Maintaining wider social networks is particularly important for those who may not have moved permanently to Spain, but consider returning ‘home’ – most often in case of declining health or the death of a spouse (cf. Casado-Díaz et al. 2004; Helset et al. 2004).

For some of my interviewees, considerations with regard to migrants’ legal status also influenced patterns of residence and mobility. Some returned or travelled outside Spain for a period of time in order to avoid the obligation to register as residents. Others, on the contrary, felt obliged to spend more than half the year in Spain – one respondent described carefully counting the days – in order to qualify as Spanish residents and enjoy fiscal advantages associated with this status. Quite often, however, legislation with regard to residence permits and registration is not taken so seriously (O’Reilly 2000).

In addition to the mobility of the migrants themselves, retirement migration to Spain also entails a substantial amount of ‘VFR tourism’ – visits in Spain by friends and relatives (O’Reilly 2003) – as well as some labour migration in order to cater for the needs of the retirees (more about that below, Economic activities and exchanges). In sum, then, as regards patterns of cross-border mobility, retirement migration displays strong transnational traits, although partly for different reasons and under different conditions than labour or refugee migration.
Identity and belonging

Transnational mobility and transnational connections also raise questions about migrants’ sense of home, belonging and identity. Transnationalism often implies that migrants do not identify exclusively with the receiving society, but maintain and develop individual and collective identities that refer to both sending and receiving countries. Such identities may take different forms (Faist 1999, pp. 56-61; Al-Ali and Koser 2002). Nations and nationalisms are often important, and the literature on transnationalism shows how different national projects and ideologies sometimes compete and sometimes combine in migrants’ identifications (Basch et al. 1994). Transnational identities may also have more local components, referring to cities or residential districts in the receiving countries and/or to former home regions, home towns or villages in the sending countries. In addition, some authors suggest that transnationalism may produce ‘cosmopolitan’ identities that are not rooted in nations or geographical places (Jurgens 2001, pp. 99-100; Vertovec 2001, p. 580). Others, however, are more sceptical about interpreting cosmopolitanism as a straightforward expression of transnationalism, suggesting that these are two dimensions that may or may not coincide (e.g. Roudometof 2005).

Research on international retirement migration suggests that identities differ considerably in this context as well. Some migrants identify strongly with either their new or their former home country, but most of them seem to develop different kinds of transnational identities. Many of my interviewees claimed to be ‘at home’ as much in Spain as in Sweden, although there were also respondents who felt more at home in one country than in the other. Reference points ranged from Spanish and Swedish neighbourhoods through cities and regions to national identifications, although claims about national identity as Spaniards were quite rare (remember that my respondents were all seasonal migrants). The different proportions and meanings of Swedish and Spanish elements in their identities reflected their mobility and residential patterns – residential history in Spain, length of stay(s) in Spain and Sweden each year – but also lifestyle preferences and the role that migration played in their life projects as retirees (Gustafson 2001).

In a similar vein, King and his colleagues suggest, regarding British retirees around the Mediterranean, that ‘[m]any retired British migrants seem to be creating new identities which comprise a mixture of elements of “here”, “there” and other ingredients which they share only with other British retirees who live in the same place in similar circumstances’ (King et al. 2000, p. 162). O’Reilly suggests that when Spanish elements are incorporated into such identities, their ‘Spanishness’ is to an important extent ascribed from a British perspective,
and may not always correspond to ‘emic’ notions of Spanishness within the Spanish population (O’Reilly 2000, pp. 86-117). Yet the emergence of such mixed identities is an important expression of transnationalism.

Some retirees tend to have more of a cosmopolitan identity. Those persons have often worked abroad and travelled extensively; some also have children living abroad. They are used to living a mobile life and to maintaining social relationships over long spatial distances, and their identities seem, to some extent, to be based on such cosmopolitan experiences and abilities rather than on strong national or local bonds (King et al. 2000, p. 162). However, even for such cosmopolitans, social life in Spain largely takes place within social networks and communities organized according to national origin, and transnational connections matter in their case as well. Thus, even though the identities of retired migrants vary considerably, they often display characteristics that can be described as transnational.

**Social networks and social structures**

Kinship and social networks together with norms regarding social obligations are often decisive forces behind migration and migrant transnationalism (Faist 2000, pp. 100-2; 311-12). Long-distance migration may separate friends and families, so migrants’ desire to maintain social ties across national borders has, of course, a strong emotional side. But transnational social networks often also provide practical help that is of crucial importance for migrants. Such help may include child-rearing and housekeeping in the sending country, help with jobs and housing in the receiving country, and exchange of information about local conditions and migration opportunities. Family relations are of particular importance in this respect (Basch et al. 1994, pp. 236-43; Herrera Lima 2001). Migration decisions and strategies often involve extended family networks, where some move, others stay behind, and family members move back and forth in order to spread risks and maximize opportunities. Migration and the development of transnational ties often represent a strategy to maintain or improve the social status of migrants and their families. Most often, higher social status in the home country is achieved through economic earnings or education obtained abroad, but transnational communities may also in themselves constitute social fields that provide positions of influence and status, in both sending and receiving countries (Basch et al. 1994; Goldring 1999).

Most retirees who move from northern Europe to Spain leave relatives and old friends behind. Their migration therefore gives rise to long-distance social ties between Spain and their countries of origin, but also creates a need to develop new social networks in Spain.
Efforts along these two lines are not only central to the social life of the migrants, but also have implications for the migration process itself.

An important reason why numerous retirees choose to pursue seasonal migration, rather than to settle permanently in Spain, is their desire to maintain social and emotional ties in their home countries, especially with children and grandchildren. When in Spain, many retirees receive frequent visits from friends and relatives from their former home countries. Some of my interviewees also let their children use their Spanish house or flat for summer holidays, when the retirees themselves were staying in Sweden. There is, of course, also the possibility that residences in Spain are taken over by the retirees’ children when the retirees die or return from Spain permanently, to be used first as holiday homes and then, as the children in their turn retire, as permanent or seasonal homes – although it is difficult to estimate how common such generational successions are. Helset et al. (2004, p. 20) further suggest that relatively young retirees may move to Spain in order to take care of previously migrated parents, and retirement migration also entails a certain amount of labour migration which may include relatives of the retired migrants (Casado-Díaz et al. 2004, p. 366).

Transnational patterns of residence and mobility produced by retirement migration may thus, in a number of ways, involve several generations.

Social networks in the former home countries may be useful to the migrants in other ways as well. Several of my interviewees, who all retained homes in Sweden, had relatives, friends or neighbours who looked after their houses in Sweden during their stays in Spain. Those who live in Spain on a more permanent basis, on the other hand, often use people ‘back home’ to buy and send goods that are not available in Spain (O’Reilly 2000, p. 122). For these different reasons, retired migrants in Spain usually make substantial efforts to maintain social contacts in the sending countries, not only through physical travel, but also through frequent use of mail, telephone, fax and email (Huber and O’Reilly 2004, pp. 339-40).

In addition, they develop new social networks in Spain. These tend to consist almost exclusively of other foreign retirees, whereas more than superficial social contacts with the local Spanish population are quite rare. Rodriguez et al. (1998, p. 195) describe how ‘[a]n expatriate society has been created parallel to the Spanish society, in which most of the retirees’ social relations are with people of their own nationality’ (cf. King et al. 2000, pp. 148-52). The residential concentration of retired migrants, often with similar social backgrounds, together with the experience of living in a foreign country with few or no previous social ties in the area, creates a strong sense of community within social networks based on national origin. My interviewees often pointed out how easy it was to make new
friends in Spain and how intense and enriching the social life was within their Swedish (or Scandinavian) communities. During their summer stays in Sweden, contacts with friends in Spain were quite rare, but a few of them arranged social meetings in Sweden with other seasonal migrants that they had gotten to know in Spain.

As O’Reilly shows in some detail (2000, pp. 118-39), expatriate communities do not only provide new friends and acquaintances, but are also a very important source of information, advice and practical help. O’Reilly as well as my interviewees describe a strong norm of ‘helping each other out’ based on feelings of solidarity and responsibility within these communities. The presence of such supportive social networks greatly facilitates the migrants’ life in Spain, and may in fact also influence their decision to migrate, as well as their choice of residential area. Social ties on a more individual level may also matter in this respect, as visits to, and discussions with, friends who had settled in Spain had, for some of my interviewees, been a first step towards their own migration (cf. King et al. 2000, p. 150). In some cases, such connections have been established through tourist visits (Casado-Díaz et al. 2004, p. 368) or even second home ownership in Spain prior to retirement. Just like labour or refugee migration, retirement migration thus involves transnational social ties and networks that are of great importance in the everyday life of most migrants, and that also have wider implications as they facilitate further migration. However, the forms and functions of these networks are partly different as the migrants are retirees and as they do not primarily move for economic or political reasons.

The communities of foreign retirees in Spain can indeed be regarded as social fields, with their own hierarchies and opportunities for social advancement. The ‘capital’ that counts in these fields is not primarily economic resources, but long-time residence in Spain, local knowledge and (Spanish) language skills – and thus the ability to give advice and help to other members of the retiree community (O’Reilly 2000, pp. 126-7). An additional form of social capital derives from involvement in expatriate organizations, as will be discussed in the next section. Contrary to findings from studies of transnational labour migration, though, social status gained within expatriate communities in Spain is usually of little or no value in the retirees’ countries of origin.

**Cultural practices and institutions**

Questions of identity, belonging and social networks are closely related to cultural practices and institutions, and transnationalism in the cultural sphere takes many different forms. Some researchers point out that transnationalism may involve cultural exchange between sending
and receiving societies, and sometimes hybridity or ‘creolization’, i.e. cultural expressions that merge elements from different cultures (Herrera Lima 2001, pp. 89-90; Jurgens 2001, pp. 100-4). However, the main focus in previous research on transnationalism has been on migrants who maintain the culture of their (former) home countries – language, religion, popular culture, celebration of national holidays, and so forth – especially when this takes a public or institutionalized form in the receiving countries and involves continued contacts and exchange with the sending countries (Basch et al. 1994; Portes et al. 1999). The role of immigrant associations is often crucial in this regard. They provide institutionalized settings for cultural flows and cultural practices – settings that are based on common origin, and usually also on perceived cultural similarity. Mass media in immigrant languages, reporting from both sending and receiving countries, are another important expression of transnationalism in the cultural sphere. Finally, culture evokes questions about immigrant integration, and about to what extent transnational cultural ties and practices stand in opposition to assimilation (Portes et al. 1999; Kivisto 2001).

Foreign retirees in Spain, including my interviewees, often display a low degree of cultural adaptation. This is very clear in the case of language skills. Many retirees speak little or no Spanish, and very few become fluent Spanish-speakers (Casado-Díaz et al. 2004, p. 367; Helset et al. 2004, p. 70). King et al. point out two reasons for this ‘linguistic laziness’ (2000, p. 135). First, most social life occurs within national/linguistic communities, so there are few opportunities to speak Spanish. Second, help with interpretation is widely available and sometimes even provided by local Spanish authorities, hospitals, etc., although in the latter cases mainly for English-speaking retirees (cf. O’Reilly 2003).

Retirement migration brings about cultural flows from sending countries to Spain in many other ways as well. O’Reilly’s ethnographic study contains numerous accounts of British people in Spain using British products and doing ‘British’ things together (O’Reilly 2000, pp. 89-94). Similarly, my interviewees often described, for example, Swedish culinary habits and ‘Swedish’ Christmas, Easter and Lucia Day celebrations in Spain. They also mentioned several well-known Swedish singers and musicians who had given performances in Spain, mainly attended by Swedish expatriates and visitors (cf. Portes 1999, p. 222). Books and videos from Britain and Scandinavia are widely available in the expatriate communities, and expatriate associations offer a wide range of cultural attractions and activities (Rodríguez et al. 1998, p. 194; O’Reilly 2000, pp. 78, 122-3).

The availability in Spain of mass media in foreign languages is another case in point. Many migrants read newspapers, listen to radio broadcasts and watch TV programs from their
countries of origin, and there is also considerable media production in Spain for the expatriate populations in their own languages. King et al. (2000, p. 207) found local newspapers and radio and/or television programs in Dutch, English, Finnish, German and Swedish on the Costa del Sol, and Hampshire (2004, pp. 491-2) lists twenty-one English-language newspapers and magazines published in Spain. From a transnational perspective, it is also interesting to note that media in Britain, Sweden and Norway have produced numerous news reports, documentaries, and even docuseries and a soap opera about expatriates in Spain (O’Reilly 2000, pp. 1-6), and that several handbooks for emigrants to Spain have been published in Britain and Scandinavia (e.g. Svensson 1988; Hampshire 2000; 2004; Källström 2003).

Some of my interviewees also described adopting Spanish habits during their stays in Spain – eating Spanish food, taking siesta, enjoying Spanish popular culture, and more generally adapting to a more relaxed Spanish lifestyle (cf. Gustafson 2002b). Similar observations are made in other studies, and although it is often argued that the ‘Spanishness’ practised in these cases is in fact quite superficial (King et al. 2000, p. 145), the leisurely lifestyle developed by foreign retirees in Spain can to some extent be interpreted in terms of cultural hybridity.

Yet even if a limited degree of cultural adaptation occurs, the transnational flows of culture that retirement migration produces are highly asymmetric. The migrants bring a lot of cultural objects, symbols and practices with them to Spain but they bring very little or no Spanish culture back to their (previous) home countries. In addition, because of the limited contacts between foreign retirees and local Spanish populations, the cultural inflow into Spain mainly stays within the immigrant groups. On a more general level, however, retirement migration can be regarded as one expression (or a direct consequence) of international mass tourism, which has had a considerable cultural impact on many coastal areas in Spain.

A significant characteristic of the foreign retiree communities in Spain is the flourishing organizational life. This was an important theme in my interviews, and other studies have shown that large proportions of retired immigrants in Spain are members of one or more clubs or associations (King et al. 2000, pp. 137-8; Casado-Díaz 2004, p. 371). Indeed, O’Reilly found over fifty British clubs only in the Fuengirola area on Costa del Sol (Huber and O’Reilly 2004, p. 343). Some organizations involve younger as well as retired persons, but in many cases retirees constitute a significant part of their membership. The associations usually gather members of the same national or regional (e.g. Scandinavian) origin. Clubs and associations arrange social and recreational activities, and also assist migrants with advice,
practical help and membership benefits, e.g., low-price journeys to and from Spain. Some associations, as well as several British and Scandinavian churches, have their own premises with employed and/or volunteer staff, libraries, reading rooms, and so forth. Many retirees spend a lot of time participating in club activities, and committee work in expatriate associations often gives social status within the immigrant community (King *et al.* 2000, p. 192; O’Reilly 2000, pp. 126-30).

The role played by migrant organizations with regard to retirees’ integration into Spanish society is ambiguous. Migrants who are familiar with Spanish language and society are often considered useful and sometimes become leaders of expatriate clubs and associations, and some activities pursued by these organizations (e.g., Spanish language courses) may indeed facilitate integration. At the same time, the organizational sphere reinforces expatriate, primarily national, communities, where foreign retirees can live most of their everyday lives without coming into contact with Spanish language, people, and culture.

From a transnational perspective, the activities of clubs and associations have multiple implications. They promote cultural flows to Spain from the sending countries, and provide an institutionalized and to some extent public expression of the expatriate presence in Spain. In addition, some immigrant organizations in Spain are affiliated with associations that are based in the countries of origin, such as the Royal British Legion and ‘Svenskar i världen’, an organization for expatriate Swedes worldwide. Similarly, British and Scandinavian churches have several branches in Spain, and one of the major Spanish-Scandinavian clubs has offices in both Sweden and Spain. Such arrangements create transnational institutional ties between Spain and the sending countries, even though the activities of individual members mostly take place in Spain.

On the whole, retirement migration does, in a number of ways, give rise to transnational cultural flows and expressions, including organized and institutional forms. The main limitation concerns the low degree of cultural influence in the sending societies.

**Politics and legislation**

Transnationalism often has political dimensions. Migrant communities and organizations have in several cases been able to exert political influence through activities directed towards sending or receiving societies (Basch *et al.* 1994). This is obvious in the case of political exiles, but migrants may also be involved in home country politics, support political parties or candidates, etc., under less dramatic circumstances. Examples of political transnationalism further include mobilization in order to secure the interests of migrants with regard to political
and economic rights in sending and receiving countries (cf. Vertovec 1999, p. 455). Also, many sending countries pursue policies directed towards their expatriate populations, for a number of different reasons (Levitt and de la Dehesa 2003): to maintain their loyalty and national identification, to attract remittances and investments, to obtain electoral support for home-country elections, to use emigrants as lobby groups in receiving countries, and/or to encourage expatriates to return home. Politicians and public authorities in the receiving societies, for their part, often pursue policies to encourage integration. More generally, the possibilities to migrate and to develop transnational connections may be encouraged, or severely limited, by state policies and national legislation (Basch et al. 1994; Waldinger and Fitzgerald 2004). National rules concerning mobility and legal status (visas, residence and work permits, citizenship rights, social benefits) are crucial in this regard. Significant migration movements may also give rise to bilateral agreements and other legal arrangements between sending and receiving countries.

The legislation that concerns retirees who migrate from northern Europe to Spain is a mix of national laws, bilateral agreements (mostly concerning taxation; Hampshire 2000, pp. 337-9) and rules on the European level (King et al. 2000; cf. Acker and Dwyer 2004). Retirees from countries within the European Economic Area (including Britain, Sweden and Norway) can move freely to and from Spain, and also have certain social security rights there. Long-time residence (more than six months) formally requires a residence permit, and raises questions about legal registration, fiscal issues, social benefits etc. that the retirees need to consider (Källström 2003; Hampshire 2004).

However, retirement migration has had little or no direct influence on these legal frameworks. Sending-country governments have generally shown little interest in their emigrant retirees. The reason is probably that the retirees are relatively few in number (especially in official statistics) and that they are considered to be a privileged group of people who have chosen to migrate in order to live a more pleasurable life. Some efforts are made to diminish tax evasion (Källström 2003, p. 52), but no substantial governmental policies are pursued in order to maintain the national loyalty of emigrants or to develop transnational connections in the interest of the sending countries.

From a Spanish perspective, retirement migration is strongly associated with tourism. Seasonal residence by foreign retirees is regarded as a development of the tourism industry (O’Reilly 2000, p. 143), and in everyday life it may be difficult to distinguish migrants from tourists (King et al. 2000, p. 144; [author 2002b]). On a local level, however, the presence of large numbers of foreign retirees has consequences, as the retirees use health care and other
local infrastructures, and also often have language problems in contacts with local authorities. Some municipalities have therefore established ‘foreigners’ departments’ where foreign residents can get information and advice in English and sometimes other languages (Rodríguez et al. 1998, p. 197). However, O’Reilly (2000, p. 148) points out that these offices often share premises and personnel with the municipal tourist agencies.

More advanced forms of transnationalism in the political-administrative field are rare, and mainly occur in the area of social and medical care. Occasionally, meetings involving sending-country officials and local authorities in Spain have been organized as social problems and health care issues in Spain have attracted political attention (O’Reilly 2000, pp. 5, 45; Hovland and Aagedal 2003), and a number of local initiatives have appeared. Helset et al. describe this as an emergent ‘transnational elderly care’ (2004, p. 93), involving public authorities, private entrepreneurs, insurance companies, voluntary organizations and individuals. Examples include nursing homes established and run by Norwegian municipalities but situated in Spain, which receive patients from Norway as well as from the Norwegian community in Spain; a municipality on Costa Blanca which regularly provides trainee posts in social and care work for students from Norwegian universities; and private (commercial) home-help services to Norwegian retirees in Spain that are paid for either by Norwegian municipalities (where the retirees are still registered as residents) or by private insurance (Helset et al. 2004, pp. 92-126). However, such transnational arrangements do, as yet, constitute exceptions.

Political participation and activism on the part of the retirees are even more unusual. Casado-Díaz et al. (2004, p. 375) suggest that there is a potential for local political mobilization among foreign retirees in Spain, but until now active involvement by this group in electoral politics – in either Spain or the sending countries – has been virtually non-existent (Rodríguez et al. 1998, p. 198; O’Reilly 2000, p. 100). Occasional examples may be found of transnational associational initiatives, such as a Swedish expatriate association in Spain attempting, together with organizations in Sweden, to put pressure on the Swedish government to re-negotiate the Swedish-Spanish double taxation agreement (Hampshire 2000, pp. 338-9). In all, however, the political dimension of transnationalism is weakly developed in this case of retirement migration.

**Economic activities and exchanges**

Economic activities are often a crucial part of the development of transnational social fields. In particular, several studies have revealed the great importance of remittances from migrants
to family members and communities in their former home countries (Basch et al. 1994; Levitt and de la Dehesa 2003, pp. 591-4). Initially, such money transfers usually aim at improving the economic situation of close relatives; later on, they may extend to investments in property, but also to collective efforts of fund-raising, often organized by hometown associations (Goldring 1999, pp. 176-7). Ethnic entrepreneurship is another important expression of economic transnationalism. Migrants’ presence in the receiving country and their connections with their former home country may create business opportunities in a number of ways. Examples include trade of goods between sending and receiving countries, services related to migrants’ needs (e.g. travel and transport) and, more generally, businesses set up in the receiving country using immigrant workforce and/or having mainly immigrants as customers (Basch et al. 1994). In some cases, such ethnic businesses develop into transnational companies, with activities in both sending and receiving countries (Faist 1999, pp. 48-51).

In a recent handbook for Swedish migrants to Spain, careful instructions are given about how to send money from Sweden to Spain, whereas no mention at all is made of money transfers in the other direction (Källström 2003, p. 88). Unlike remittance-sending labour migrants, North European retirees in Spain have not migrated in order to find a job, earn an income, and support relatives back home. On the contrary, they generally receive pension payments from their countries of origin with which they pay their living costs in Spain.

As retirees are no longer working, they do not become ethnic entrepreneurs either, but their presence in Spain nevertheless has economic consequences. First, they may have a substantial influence on local housing markets – making them, in fact, part of transnational markets, where the attractiveness and costs of retirement homes in Spain are compared, and in a sense ‘compete’, with residences in for example France, Florida, Thailand and Turkey. Second, retirees have come to constitute an important market for ethnic businesses (King et al. 2000, pp. 210-11; cf. O’Reilly 2000, pp. 64-5). Over time, considerable British and Scandinavian business infrastructures have developed in Spain. They include self-employed British and Scandinavians working in Spain, as well as shops, restaurants, bars and other commercial enterprises in Spain run by expatriates, or with English- or Scandinavian-speaking personnel. For example, the address register of a recent handbook for Swedish migrants lists around 400 businesses on Costa del Sol and Costa Blanca where either Swedish or Norwegian is spoken. Headings range from air conditioning, alternative medicine and antique shops to translators, travel agents and veterinaries (Källström 2003, pp. 230-81). Several business activities are more distinctly transnational. Some involve the import of goods (food, books, videos etc.) from Britain, Sweden or Norway to Spain. Others involve transnational organizational ties.
For example, several banks, insurance companies and estate agents based in Britain and Scandinavia have set up offices or employed representatives in Spain, or started formal cooperation with Spanish firms.

The impact of retirement migration on such transnational economic activities is, of course, indirect. Ethnic businesses employ mostly younger persons, and retirees are not their only customers. Yet it is clear that the ethnic business infrastructures described here to a considerable extent serve the needs of retired persons, and that such business opportunities – and subsequent labour migration – are indeed a significant transnational consequence of retirement migration.

**Retirement migration and transnationalism**

The comparisons made thus far between retirement migration from northern Europe to Spain and existing research on transnationalism in labour and refugee migration displays both similarities and differences. Retirement migration can be described as clearly transnational in some respects and less transnational in others. In some respects, expressions of transnationalism are quite similar to those found in other forms of migration; in other respects they differ substantially.

Retirement migration produces transnational identities and feelings of belonging that refer to both sending and receiving countries. The migrants travel extensively – which they can do as retirees – and make great efforts to maintain social and emotional bonds with their former home countries. Transnational social and family networks influence their migration, their subsequent mobility and their everyday life activities, but in ways that are marked by their position as retirees. For example, whereas early migrants in the case of labour and refugee migration are often followed, later on, by other family members, retirement migration rather gives rise to return visits by the migrants and to ‘VFR tourism’ in Spain by their relatives.

In the cultural sphere, a certain amount of cultural mixing or ‘hybridity’ occurs, as migrants acquire some (more or less) Spanish habits and develop a more leisurely way of life. Yet the lifestyle pursued in Spain by most retirees remains strongly influenced by their national origin, with regard to language, social networks and many everyday activities. Retirement migration thus gives rise to substantial cultural flows to Spain from the migrants’ home countries. These transnational cultural flows often take an organized and institutionalized form, not least through immigrant clubs and associations. The latter become particularly important in the case of retirement migration, as retirees have more time than labour migrants for club activities and socializing within the expatriate community, and do
not, as many younger migrants, become socially and culturally integrated into the receiving society through working life.

Retirement migration seems to produce little political transnationalism. Some political-legal initiatives and arrangements can be found, but retirement migration is not perceived as a major political issue, either in Spain or in the sending countries, and political activism among the migrants is very low indeed. There are several possible reasons for this – low political activity among retirees in general, their marginal position in Spanish society (poor social integration, language problems, etc.) and the fact that a common motive behind their migration is the pursuit of a more ‘relaxed’ lifestyle.

In the economic sphere, retirement migration involves no remittances to needy relatives or poor hometowns in the sending countries. Economic flows rather go in the opposite direction (pension payments), and with nothing of the transnational social connections that remittances involve. However, retirement migration does have a considerable indirect economic impact, as foreign retirees in Spain constitute attractive markets for various ethnic businesses. Such businesses often, in themselves, have transnational characteristics, and involve a certain amount of labour migration. Together with clubs and associations, the wide range of ethnic businesses creates expatriate infrastructures that institutionalize transnational practices, relations and identifications and thus provide an alternative to cultural assimilation for many retirees. Also, through these infrastructures the foreign presence in Spain is institutionalized and to some extent publicly visible.

In the sending countries, on the contrary, the institutional and public visibility of retired expatriates is very low, and this points towards a further limitation in the transnationalism of this form of migration. Retirees bring a lot of practices, products and money with them to Spain, but very little is brought back to their former home countries. Social status can be gained within expatriate organizations in Spain, but has little value in the sending countries. In addition, even in Spain most cultural imports stay within the expatriate communities, and have little impact on the wider Spanish society.

To sum up, retirement migration differs in several ways from those forms of migration that were the origin of the transnational perspective. The migrants are retired, which means that they do not work, that migration occurs at a relatively late stage in their life, and that the opportunities for participation in the receiving society are limited. They are mostly economically independent (through pensions) and have few economic obligations towards children and other relatives, and their motives for migration mainly concern leisure, health and lifestyle. Although they may in some respects experience marginalization or exclusion in
Spain they are, in a wider comparative perspective, a highly privileged group of migrants. These diverse factors produce, as I have tried to show, expressions of transnationalism that have some similarities with those reported in previous research, but that also differ in several respects, and that are more pronounced in some areas than in others.

**Expanding the field of transnational studies**

The observations made thus far indicate that the transnational perspective is applicable to other forms of human mobility than labour and refugee migration, and that the scientific understanding of transnationalism may benefit from the study of many different, more or less transnational, forms of migration. Even the absence of certain transnational characteristics can throw some light on the preconditions for transnationalism; the six analytical dimensions employed here may be useful for such comparative work. I will conclude with a few suggestions about, first, what the study of international retirement migration may add to our understanding of transnationalism, and second, how a transnational perspective may provide new directions for research on international retirement migration.

An important and controversial issue in previous theoretical discussions concerns the long-term viability of transnationalism. Sceptical commentators have argued that transnational ties and activities will, sooner or later (or at least within two or three generations), be replaced by assimilation into the receiving society (Kivisto 2001; cf. Waldinger and Fitzgerald 2004). On the contrary, the transnational literature often suggests that transnationalism will persist. Basch et al. (1994) more specifically argue that transnational practices are likely to continue as long as people face economic insecurity in the sending country and racial discrimination and low social status in the receiving society. Others have emphasized the importance of new means of transport and communication for sustained transnational connections (Portes et al. 1999). The case of retirement migration suggests a set of other mechanisms that may, hypothetically, reproduce long-term transnationalism.

Retirement migration occurs at a relatively high age, which limits the possibilities for assimilation. As retirees, the migrants are not involved in paid work, but spend a lot of time in expatriate settings and, partly for this reason and partly because of their age, often consider it difficult to learn Spanish and to become part of the Spanish society. They retain substantial personal ties (children, grandchildren) with the sending country, often involving frequent visits and even seasonal residence there. Importantly, retirement migration in most cases concerns only the retiree generation. It gives rise to a certain amount of labour migration, but the labour migrants are not necessarily relatives of retired migrants. In some cases, the
retirees’ children may take over their Spanish homes, but they are not likely to move there on a more permanent basis until they too have retired. Thus, migration by successive cohorts of retirees, with or without generational kinship relations, seems to provide good conditions for sustained transnationalism – at least along some of the dimensions discussed in this paper.

In addition, the ‘lifestyle’ motives behind migration may in some respects have similar consequences. The leisurely lifestyle developed in expatriate settings in the Spanish coastal areas involves a strong commitment to community life and social networks based on national origin. Also, the ‘residential amenity maximisation’ (King et al. 2000, p. 110) pursued by the large number of seasonal migrants is often described in terms of ‘having the best of both worlds’ (Huber and O’Reilly 2004, p. 338) – which indeed implies a desire for some enjoyable differences between the two worlds. These conditions, too, are likely to perpetuate transnationalism.

The latter remarks highlight the relatively privileged position of many retired migrants in Spain. Previous research indicates that transnational practices and identifications are often a response (in both emotional and economic terms) to marginalization and/or discrimination in the receiving country and poverty in the sending country (Basch et al. 1994). The case of retirement migration to Spain suggests other possibilities. Retired migrants generally have economic resources that allow them to travel, they can often afford dual residences, and they constitute an attractive market for ethnic businesses. In these respects, economic resources contribute to transnationalism. On the other hand, well-off retirees from northern European welfare states do not normally have to support their (usually grown-up) children or other relatives in their home countries. The phenomenon of remittance-sending, and the strong transnational social and economic ties that this may produce, is therefore absent in this form of migration. Moreover, since the retired migrants are perceived as a relatively privileged group with no serious problems, they have not become a subject of any major transnational political initiatives.

The transnational perspective on migration may also suggest new directions for research on international retirement migration. Existing research in this area largely focuses on health and quality of life, motives behind migration, and the lifestyle(s) pursued by the retirees. Some studies have involved questions about national identities and patterns of mobility and residence, but other forms of transnationalism in retirement migration await more systematic exploration.

One relevant task would be to map the transnational social networks of individual migrants and investigate the various mobilities employed to sustain them – travel by migrants and by
their friends and relatives, contacts by mail, telephone, email, and so forth. A set of related questions concerns inter-generational relations and their impact on migration and residential strategies, including the issue of generational succession in the receiving country. These examples indicate, more generally, that a comprehensive picture of retirement migration must include not only retirees, but also the interrelationships between retirement migration, labour migration and tourism.

The political dimension also deserves further examination. With growing numbers of retirees settling abroad, and efforts on the European level towards free mobility and the development of a ‘European citizenship’, questions about migrants’ rights and the obligations of sending and receiving countries with regard to migrant populations will probably come to the fore. To what extent are policies in this field adapted to the conditions of retirement migration? Ackers and Dwyer (e.g. 2004) have presented important work in this area, but more can be done, for example on bilateral issues, and on activities pursued by sending-country authorities in the receiving countries. The tendencies towards transnationalism in health and elderly care, as discussed by Helset et al. (2004), clearly merit closer investigation.

Finally, the transnational perspective may also suggest a methodological turn. Most empirical studies of international retirement migration have, thus far, been made by researchers from either sending or receiving countries. Systematically integrating sending- and receiving-society perspectives – and scholars – is a truly transnational challenge for future research.

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