Transnational aging: toward a transnational perspective in old age research

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Innovations in transportation and communication technologies have led to an increasingly globalized and interconnected world. The resulting compression of time and space has not only changed the world economy, but it has also had a profound impact on people's everyday social life. People are now able to stay in real-time virtual contact with globally dispersed others, share images with a few clicks, obtain information instantaneously, etc. At the same time, travel infrastructures improved and airline tickets became affordable for a wider population. Consequently, back-and-forth movements between different countries are no longer reserved for a small elite. For the first time in history, people are able to be socially present in different locations, more or less simultaneously. Migration scholars introduced the transnational perspective to describe and conceptualize the various relations (e.g., social, economic, political) individuals and communities develop and sustain across geographical distances and national borders (Faist 2000; Glick Schiller et al. 1992). Soon the use of this concept spilled over to other social science disciplines, contributing to the emergence of a new multidisciplinary field of transnational studies (Kha-gram and Levitt 2008).

However, researchers studying aging have been comparatively hesitant to establish a transnational research agenda (Philipson and Ahmed 2004; Torres 2013). The principal reason for this reluctance is the ongoing dominance of “methodological nationalism” (Wimmer and Glick Schiller 2002) in aging research (Toyota and Xiang 2012).

Methodological nationalism refers to the naturalization of nation-states by the social sciences, which for a long time equated society with the nation-state and considered national borders as the natural unit of study (Wimmer and Glick Schiller 2002). Such territorial-bounded thinking is also embedded in one of the focal concepts used in this field by researchers and policy makers alike: aging in place. Accordingly, concepts, research questions, hypotheses, data collection and conclusions are drawn from within a framework that assumes a quasi-natural overlap between a territory and an individual's social space (Zhou 2012). As a consequence, theoretical premises and methodological approaches to aging continue to overlook dimensions in older people's lives that go beyond the border and boundaries of a defined (national) territory.

The concept of transnational aging can serve as a methodological lens for studying these transnational dimensions in old age (Horn et al. 2013; Horn and Schweppe 2016). Defined as the “process of organizing, shaping, and coping with life in old age in contexts which are no longer limited to the frame of a single nation state” (Horn et al. 2013: 7), transnational aging cuts across many themes relevant for aging research (e.g., everyday practices, biographies, family relationships, social services, well-being, social policy) and provides an approach to expanding and revising the theoretical landscape. This includes, for example, theories in social gerontology (e.g., life course perspective), ecological theories (e.g., aging in place) or theories of identity (e.g., intersectionality perspective).

Several developments indicate that transnational processes in old age will gain relevance in the future: (1) the aging of migrant populations in many industrialized countries; (2) the increasing trend of international retirement migration; and (3) the growing number of older people who experience the emigration of close relatives. The four papers

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presented in this special issue examine these developments from different theoretical and methodological angles. They are part of the outcome of the International Symposium “Organizing Aging Transnationally and its Social Implications,” March 12–13, 2015, organized by the Transnational Aging Research Cluster at the Institute of Education, University of Mainz (Germany).

Aging migrant populations

During the last decades, the number of migrants reaching retirement age in industrialized countries has increased significantly (Leach 2008; White 2006). The majority of studies on aging migrant populations focuses on their vulnerabilities originating from the risks of migration and the accumulation of disadvantages through their life course (Dwyer and Papadimitriou 2006). Accordingly, these studies tend to examine the stressors older migrants encounter in their country of residence and to analyze the relationships between ethnicity and social disadvantages (Baykara-Krumme et al. 2012). Given this focus, cross-border aspects and dimensions of aging migrants’ lives often go unnoticed (Ciobanu et al. 2017).

However, a growing body of the literature can be found which approaches aging migrants from a transnational vantage point. This literature reveals that older migrants engage in a variety of transnational practices, including the maintenance of close ties with friends and relatives in their country of origin, the cross-border utilization of healthcare services and the development of transnational identities through different forms of belonging to their earlier and recent communities (Baykara-Krumme 2013; Bolzman et al. 2017; Smith Nielsen et al. 2012). Questions of belonging have been relevant to transnational studies since their very beginning and are increasingly taken up by transnational aging scholars. Drawing on Levitt and Glick Schillers’ (2004) differentiation between “ways of being” and “ways of belonging,” Zontini (2015) shows that although transnational practices (“ways of being”) may diminish with advanced age (e.g., because of reduced mobility), the same does not apply to identities and sense of self (“ways of belonging”). Constructions of self and identity result from connections to different locales, but the association between transnational belonging and older people’s emotional well-being has still remained unexplored.

In their paper, Klok et al. (2017, in this issue) address this gap by exploring whether a sense of belonging functions as a protective mechanism against loneliness among older Turkish and Moroccan migrants in the Netherlands. Adding a transnational dimension to Berry’s (1980) model of acculturation, they find that a sense of transnational belonging leads to poorer well-being. The article follows a quantitative approach using data from the Longitudinal Aging

Study Amsterdam (LASA) of older migrants aged 55–66. Thus, it also contributes to the methodological diversity in transnational research, which—to a large degree—is based on qualitative research designs.

Most literature on aging migrants’ transnational entanglements emphasizes the persisting power and significance of the nation-state. For example, social security systems, which in many ways are shaped by national states, have an important impact on the temporal and spatial dimensions of older migrants’ transnational involvement as they are influenced by the access and portability of social security entitlements across countries. Thus, for example, the question of whether pensions can be received in another country than the country of residence have a bearing on the older migrants’ decision whether to join their children abroad, to stay in the country of residence or to develop pendular migration patterns (Bolzman et al. 2006; Lunt 2009). Still, the portability of social security rights is a complex issue due to differences between social security systems, formal hurdles related to access requirements and administrative discretion, especially in the interpretation of residency rules (Avato et al. 2010). Therefore, older people often develop residential strategies in order to maintain access to social benefits and services in the receiving country. These strategies are particularly relevant in case of healthcare services and means-tested benefits, such as old age pensions. Indeed, from a classical welfare state perspective, extending the eligibility for means-tested entitlement programs to older people moving outside the national territory seems to contradict their national development and foundations (Mishra 2000).

However, Böcker and Hunter (2017, in this issue), in their paper, show that the Dutch and French governments have taken steps to break this link between solidarity and territorially bounded consumption of welfare, by providing lifelong income security for older migrants who return to countries of origin on a permanent or semi-permanent basis. The paper asks for the motivation of policy makers initially developing these novel policy tools. Based on interviews with key stakeholders and available official documents, Böcker and Hunter show that in both France and the Netherlands, policy makers’ initial motivations can be characterized as rather benign, if not beneficent: to facilitate return for those who are willing but unable to afford it. However, two types of obstacles impeded the implementation of these policies. One, non-discrimination clauses and free movement rights in EU law make it difficult to implement particularistic policies that benefit a specific category of older people. And two, widespread anti-migrant attitudes in the two countries promise little opportunity to gain votes with migrant-friendly measures. With first-generation aging migrants gaining demographic weight, the question of how to secure/better their welfare transnationally is likely to gain more and more importance.

International retirement migration

Another increasingly widespread mobility trend in old age is international retirement migration. The term usually refers to the movement of older people from the Global North to countries with better climate, extended leisure options, lower living costs and attractive landscapes (Casado-Díaz et al. 2004; King et al. 2000). Research in this field emerged in the 1990s and has primarily focused on the so-called life-style migration of Northern European retirees, especially to Spain. These studies emphasize that international retirement migration is often not migration in the classical sense (Nokielski 2005). Older people do not relocate their residence permanently abroad, but rather tend to move frequently between their countries of destination and origin, develop transnational lifestyles and identities, engage in transnational social, cultural and political activities and maintain relationships with friends and family members in their earlier communities (Gustafson 2008; O'Reilly 2000). In addition, researchers have addressed questions related to the retirement migrants' access to and use of health and long-term care services in their new environments (Ackers and Dwyer 2002; Blaakilde 2014; Hall and Hardill 2016; La Parra and Angel 2008).

More recently, a diversification of destinations for international retirement migration can be observed. New focal points are emerging in Africa (Chege 2014), Latin America (Hayes 2015; Lardiés-Bosque et al. 2016) and Southeast Asia (Husa et al. 2014; Ono 2008; Toyota 2006; Wong and Musa 2015). In contrast to life-style migration, the older peoples' hope for the resolution or alleviation of currently perceived or anticipated personal strains and problems appears to be a core characteristic for this kind of mobility (Bender et al. 2014; Hayes 2015; Toyota and Xiang 2012). This includes financial problems due to low pensions, as well as social isolation or long-term care needs. Indeed, the establishment of old age facilities for German-speaking older people in South East Asian and Eastern European countries can be seen as a response to the care deficit in Austria, Germany or Switzerland (Bender et al. 2017a). While some academic attention has been paid to the socio-political context of this phenomenon (Horn et al. 2016), little is known about the processes that explain the organization-specific configurations of such facilities.

Bender et al. (2017b, in this issue) address this very issue. Their paper presents findings from an ethnographic study of old age care facilities for German-speaking people in Thailand. It analyses the conditions and processes behind the development and specific configurations of old age care facilities for German-speaking people in Thailand. The authors argue that even though transborder processes at the socio-structural level are important backdrops for the emergence of these facilities (e.g., the possibility to transfer

pensions from German-speaking countries to Thailand or the Thai policies that facilitate retirement migration), they are not sufficient to explain the specific configuration of these facilities at the local level. In this regard, they point out the central role played by the facility operators as transnational actors who mediate between the countries and the various groups of actors (e.g., residents, staff, relatives and neighborhood) involved in these facilities. The authors conclude that the processes of mediation and intertwining are important and distinctive features of the emergence of these facilities, necessitated by the fact that although the facilities are located in Thailand, their "markets" are in the German-speaking countries of their target groups.

Emigration of young people

Despite multiple differences, for example regarding their motivations, ethnicity etc., aging and retirement migrants share the experience of having moved to another country. However, it is not only older people with migration histories who are involved in or affected by transnational processes. Given the increasing international migration of younger people, a growing number of older people in the sending countries experience the emigration of (some of) their descendants. One strand of studies on older family members "left behind" points to the dependencies and vulnerabilities caused by their children's emigration (King and Vullnetari 2006; van der Geest et al. 2004). Another strand of research emphasizes how, with sometimes enormous efforts, the emigrated children strive to comply with intergenerational norms of reciprocity, for example by sending remittances or providing emotional support via Skype or telephone (Baldassar et al. 2007). Older family members in the country of origin are not just passive receivers of transnational support. They actively contribute to the transnational family's well-being through transforming their role as parents and grandparents according to the new circumstances. Older women in particular engage in more or less frequent travels to their children's country of residence, sometimes for extended periods (Deneva 2012; Lie 2010).

Besides visits, phone calls and the sending of gifts and money, new information and communication technologies (ICTs) have become constitutive modes of transnational grandparenting (Baldassar et al. 2017). There is a general consensus that ICTs have changed the migration experience, offering new avenues for virtual modes of co-presence and potentially creating new functions and changes in the nature of family relationships (Bacigalupe and Lambe 2011; Baldassar 2008; Wilding 2006). As argued by Tarrant (2015), ICTs can facilitate a "space for intergenerational cohesion" but at the same time "exacerbate the emotional distance between generational groups" (295). However, there is still

very limited knowledge about the impact of ICT-based communication on older peoples' social relations and well-being in transnational family settings. What meanings do older people attach to the use of ICTs? What factors facilitate or hamper their access and the use of ICTs? How are virtual and face-to-face co-presence related to each other?

Nedelcu (2016, in this issue) addresses these and other issues in her paper on transnational grandparenting practices of older Romanians with children and grandchildren in Canada and Switzerland. Based on data gathered through 101 qualitative interviews with high-skilled Romanian migrants and their parents, Nedelcu shows that migrants' parents are able to acquire manifold technological skills in order to cope with distance and separation and to improve the quality of their interaction and relationships with children and grandchildren living abroad. She further reveals how ICTs and cross-border mobility allow grandparents to take on their role as childcare providers across borders and develop new transnational lifestyles. The favorable integration of their children in their destination country offers the grandparents avenues to take on these new roles. These avenues, however, are blocked for migrants who lack the necessary resources to fulfill the requirements for visitors' visas or family reunification.

Altogether, the four papers provide insights into different aspects of transnational aging at the macro-level of politics, the meso-level of organizations and the micro-level of the family/individual. This special issue shows how transnational processes diffuse into different areas of life in old age (e.g., through policies) and are actively shaped by the older people themselves (e.g., through their everyday practices). The range of transnational aging phenomena addressed as well as the diverse methodological approaches add new dimensions to previous research in the field and illustrate the importance of (re-) reading existing—and collecting new—data from a transnational perspective.

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