



Keele University

Centre for Social Gerontology

## European Science Foundation

### Exploratory Workshop Ref: EW02-175

Title: 'Intergenerational Relationships, Migration and Ageing: Policy and Behaviour'

Times/Dates: 12.30pm Friday 18th July until  
12.30pm Monday 21st July 2003

The meeting was held at: Keele University Management Centre,  
The Hawthorns, Keele Village,  
Staffordshire, ST5 5BG, UK  
Tel: +44 (0)1782 584023  
<http://www.keele-conference.com/keelemancen.htm>

Convenor's title and contact details: Prof. Simon Biggs,  
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Co-convenors: Prof. Ariela Lowenstein and Prof. Ruth Katz  
Haifa University



## **ESF Exploratory Workshop EW02-175 Scientific Report**

**Workshop Co-ordinator: Prof. Simon Biggs, Keele University**

**Title: 'Intergenerational Relationships, Migration & Ageing: Policy & Behaviour'**

### **Executive Summary**

The Workshop was held as a meeting of experts from nine countries to facilitate discussion about the impact of intergenerational relationships on transnational migration in the European context. A preliminary identification of baseline data and of available concepts and methods was also undertaken in an attempt to assess the 'state of the art' in this field. The current evidence-base and methodological issues were critically assessed.

Reports were heard from France, the United Kingdom, Germany, Sweden, Norway, Spain, Italy, Israel and the Netherlands. An overview was also presented on research in the United States.

#### *Evidence-Base*

Data available was uneven, with some countries having generic databases from which secondary analysis could be undertaken, some specific databases on ageing or migration, in some cases research was localized, whilst in others neither national nor local research appeared to be undertaken.

Policy also appeared to vary considerably between national contexts, both in terms of specific policies on migration and on ageing populations. It was considered that 'baseline' assumptions were as likely to be contingent upon political and media rhetoric as scientific research evidence.

A review of current evidence indicated the diversity of European experience and the co-existence of different forms and waves of migration. Examples include: work migration in the immediate post-war period, retirement migration beginning in the 1970s and waves of political/refugee migration in the 1970s and 80s, and contemporary period. Policy and service models also varied between multicultural, integrative and culturally independent approaches. The relationship between policy and behaviour was therefore judged to be diverse and complex in character. The relationship between migration and later life was however, under researched and underdeveloped. Little attempt had been made to place notions of positive ageing within a context of intergenerational relations and migration.

A key observation was a need for theoretical tools that took into account the fields of both gerontology and migration studies. The relation between continuity and discontinuity of experience was seen as critical to conceptual and research innovation in this area.

#### *Method*

Generating data on ageing and migration would need to take into account the multifactoral, interdisciplinary, intergenerational and intercultural demands on methodology.

It was considered that whilst there was some evidence from large survey data, this was difficult to make sense of unless it could be complemented by qualitative data on the experience of ageing and migration. A priority would therefore be the development of data collection and checking that took the experience and active strategizing of older migrants and their intergenerational relations into account. Further, attention should be given to the dynamics of culture and age in the research context and the fostering of a cohort of researchers within the age and cultural populations under study.

The absence of representation from Central and Eastern European countries was also noted as a methodological flaw in the current workshop.

### *Recommendations*

The question of ageing populations, migration patterns, policy and behaviour is of burgeoning importance and one that the European research community is addressing in an uneven and fragmentary manner. Of particular importance is the need for study informed by the experience of Central & Eastern European groups.

Whilst there are encouraging signs of scientific investigation into the relationship between ageing, migration, policy and behaviour, the field is currently empirically and conceptually underdeveloped. As a research agenda it therefore includes a large number of possible trajectories. A *Research Network* is needed to clarify the theoretical and methodological basis of a proposed empirical study. The scope and focus of such a study also requires further planning. The result should be a scientific research proposal that takes these factors into account.

### **Scientific Content**

The Workshop was held as a small intensive meeting to facilitate discussion about the impact of intergenerational relationships on transnational migration in the European context. Participants were invited to undertake preliminary identification of baseline data, plus scrutiny of concepts and methods currently available in the following areas:

1. Transnational migration & transnational communities in the European context.
2. Life-world and decision-making processes affecting older adults and migration.
3. Friendship patterns, family ties & interactions with helping professionals.
4. Relationship between policy environment and everyday behaviour.
5. Facilitating positive age-identities.

The scientific content consisted of two parts, examining the current state of *Evidence* and *Method*.

A *Keynote Presentation* by Prof. Toni Antonucci examined the relationship between ageing, policy and migration in the US context, outlining the key issues arising from research, including models and methods. Naina Patel, Ariela Lowenstein, Chris Phillipson summarized issues and lessons learned from comparative and cross-cultural research that they have been engaged in. *Participant Contributions* were also made, addressing the state of play in each national context. Contributions were made covering 9 countries, including:

- Claudine Attias-Donfut (Fr), Svein-Olav Daatland (No), Andreas Hoff & Hans-Joachim Von Kondratowitz (De), Ruth Katz (Is), Maria Luisa Marrugat (Esp), Raffaello Martini (It), Sandra Torres (Swe), Chris Phillipson (UK), Gerben Westerhof (NL).

Copies of presentations are available on request.

### *Evaluation of Evidence Base*

Demographic data on ageing population and migration showed the following trends:

Data covered specific national migration figures and old age policies (where available) and issues arising. However, data available was uneven. Some countries, for example, France and the Netherlands had commissioned bodies to undertake national studies. Some rely on generic national databases and a series of local studies, as in the UK and Germany. Others, such as Spain and Italy did not appear to have developed databases at the time of the workshop.

Participants were asked to address:

- Country-specific characteristics of migration.
- Reasons for inward and outward migration.

Again, wide national variation was discovered, with considerable differences apparent on how to define migration and the accompanying notion of national citizenship. The historical experience of each national context was seen to determine current attitudes to policy.

Some countries had until recently been sources of ex-migration, for example Italy and Spain. Others, such as Sweden, UK, Germany, France, Netherlands, Israel and Norway had experienced in-migration. Contemporary trends sometimes reversed this experience, for example Spain has recently experienced in-migration from retiring northern Europeans, and Italy was undergoing a period of in-migration from Albania, Balkans and North Africa. In the latter case, historical reversal was creating considerable tension within certain communities.

The reasons for migration also varied. Work migration, characterized post war migration, affecting different populations depending upon the nation state concerned. Migration might have been between European countries, from former colonies or countries with historical links with the host nation. Another source of migration included political asylum in the 1970s and 1980s, and more recently refugee migration from both east and south. These migrations were thought to have happened in waves, characterizing particular forms, reactions and attitudes. A third form of migration, based on the movement of affluent retired groups, created quite different patterns and issues.

Suffice it to say that, migration patterns in Europe are diverse and complex, and whilst they can appear to hold common characteristics, closer inspection reveals a diversity of experience in both migrating and receiving communities. Further, migration has been undertaken by particular historical cohorts, leading to different patterns of generational residence and contact, with many groups resident in their second homeland for upwards of three generations. Under such circumstances, current definitions of 'migrant' status become meaningless, in favour of examining transnational networks and commitments.

Participants were also asked to consider mediating factors that might include:

- Intergenerational rules and resources held by particular cultural groups.
- Policy 'base models\*' for ageing and intergenerational relations (dependency, active, productive ageing etc- what is it to 'age appropriately'?)
- Policy 'base models\*' for migration (multicultural, integrative, separatist, conformist etc)
- Media representation of intergenerational relations and of migration.

\*By *base models* is meant the underlying assumptions or models guiding policy.

Different groups appeared to adopt different strategies for coping with the migratory experience; however there was little empirical and scientific evidence available to support detailed observations, particularly when older migrants are considered. These strategies involved the maintenance of transnational ties; responsibilities and family connections, intergenerational chain-migrations whereby older and younger generations followed a middle, working generation; also the creation of self-contained age-based communities in the host nation, with little contact between generations.

Service responses also varied considerably. In some cases, such as in Scandinavian countries, considerable effort appeared to have been made to address the cultural requirements of minorities, such as Finns and Middle-Eastern migrants to Sweden. UK services often reflected self-help and voluntary activities by minority ethnic groups, against a multiculturalist public policy. In France, the republican ideal of acculturation based on French citizenship is subject to debate and revision. Welfare systems, based on family support, where perhaps Spain is an example, may experience tensions coping with retiree migration where these family ties are less marked.

The experience of social prejudice, including at first-contact, as well as coping with enduring aspects of racism were reported to have had persuasive influences on the strategies adopted by groups living in a second homeland. Differences were also noted in expectations, residence, and future plans between groups.

Policies toward migration, citizenship and toward ageing populations vary considerably. There appears to be little consideration of the interface between policies toward an ageing population and those toward minority groups and migration. Both, however were subject to standardization across Europe in terms of current policy and it was often assumed that notions of 'successful', 'positive' and 'productive' ageing were unproblematic. It was felt that the absence of a scientific and conceptual base for age and culturally literate definitions was often filled by media concern and political rhetoric.

Unfortunately this state of affairs also extends to scientific theory. With a few notable exceptions, theories of migration show little cogniscence of generational and intergenerational issues or experience of the older or ageing migrant. Rather, models tend to assume a younger adult cohort and extrapolate this experience to cover other age-groups. Gerontological theory is largely based on Western European and North American studies. These studies emphasis the value of continuity of life course experience and there has been little attempt to theorise the value of discontinuities, such as those brought about through migration. These considerations would have a significant effect on the discovery of positive models of ageing that took into account cultural diversity and the experience of migration. Further conceptual work was therefore needed.

## *Evaluation of Method*

There was general agreement at the Workshop, that older adults should be considered to be active agents in negotiating life-transitions and relations. Methods of investigation should therefore reflect that perspective, but that it has been underdeveloped to date. Inter-generational communication will exhibit patterns of conflict as well as solidarity. Some of the key sites of intergenerational relations would include: the family (e.g.: parent-child, grandparenting, sandwich generation), friendship patterns (both peer and intergenerational), and interactions with helping professionals. The social 'vitality' of older people and ageing migrants as social groups should also be fore-grounded, in the sense of whether a self-generated political agenda exists, how it is manifested if at all, who are the interests groups involved and what profile do any such groupings have.

Examining the relationship between policy and behaviour on complex situations such as 'Intergenerational Relationships, Migration & Ageing' requires innovative thinking about method. Addressing the relationship between policy and behaviour raised the question of the amount, nature and source of information that individuals have to inform their inter-generational relationships and decision-making. Attitudes and behaviour may be contingent upon understandings of national policies on ageing, as well as transnational policies. There are a number of studies identifying national trends and population characteristics. However, there are far fewer that have examined the life world, age-identity and decision-making processes that happen around older people.

Influences may be expected to be multifactoral and interactive, requiring a mixed scientific method and probably the development of new or modified instruments. Such a mixed methodology would involve the collection of both quantitative and qualitative data. Further, the collection and interpretation of data would require sensitivity to inter-ethnic, cultural and generational issues. Such a consideration would go beyond sensitivity to forms of communication, and would have to engage with the social, historical and generational power relations between researchers and respondents. There were reports that minority groups in the UK, for example, were exhibiting 'research fatigue' and an increasing unwillingness to participate in studies that appeared to provide little change in their conditions.

Were a research programme to be developed that would help to explain the relationship between policy and behaviour, it was considered essential that methods be adopted that accessed the meaning given to particular policy initiatives, the ways they were recognized and interpreted by key actors and the strategies that were adopted.

Methodological issues arising therefore included:

The interdependence of quantitative and qualitative sources of data.

The need to encourage a cohort of researchers from within ageing and migrant populations.

Engagement with the intergenerational and intercultural nature of access, data collection and interpretation.

Clarification of definitional and categorical assumptions for the purposes of comparative study.

Developing processes of checking, feedback and community involvement.

It was felt that it would be premature to make decisions on a research design. The current overview had revealed a wide number of issues and populations around ageing and migration. Further discussion would be required to identify the most appropriate and pressing theme and accompanying methodological approaches.

### **Assessment of Results/Contribution to the Field**

This section has been used to summarise the main findings of the workshop in terms of an exploratory assessment of the current 'state of play' within the field. The report then goes on to recommend how the Foundation might take this work forward.

1. The field is *Theoretically* underdeveloped, with gerontological theory and theories of migration existing in parallel, but rarely informing each other. There is a tendency to inappropriately stretch models designed to explain migration by youth and people of working-age to address late-life issues. There is a particular need to examine the effects of continuity and discontinuity of experience across the life course and its value in explaining identity and motivation.

2. There is a need to develop *methods* that access the experience, motivation and strategies adopted by older migrants themselves. In most of the countries represented there is some form of gross statistical information, with the inevitable problems of cross-comparability of definitions of migrant status and citizenship. There is almost no scientific data on the intergenerational subjectivities essential to interpreting the meaning of such baseline data. This vacuum appears to be filled with political and media rhetoric. An overview of the base models and policies operating within and between countries, with particular emphasis on how they are understood and effect intergenerational behaviour is also needed.

3. The field is *Empirically uneven*, between countries and migration groups. There are for example, a relatively large number of generic studies of ethnicity and migration, particularly from English-speaking countries, that rarely examine late-life issues. There are an increasing number of studies of North to South retirement migration within Europe, with a focus on retirees. However, there are very few studies of the impact on the receiving communities and of the long term implications, for example the ageing of active retirees into a Fourth age of increasing dependency.

With the exception of studies examining the particular post-unification experience in Germany, there appears to be a serious deficit of studies into the impacts of east-west migration across Europe. Both the impacts for host nations and first-homelands appear not to have been studied.

4. *Scientific initiatives* in this field remain disconnected. A number of Institutes, Organizations and Foundations appear to have sponsored baseline initiatives in this area. However, these appear to be fragmentary, with little attempt to communicate, overview or coordinate between those initiatives.

It was clear from the workshop that further development work would be needed before a definitive research proposal could be submitted to a funding body.

It was therefore concluded that *Networking* would be required in order to stimulate and consolidate the scientific community's response. This network should have as its object a clearly articulated research proposal. As part of its work it should prioritise the most pressing areas requiring development in what is currently a confusing and underdeveloped area of study.

Key to this initiative would be:

- An interdisciplinary approach, engaging with the multiple impacts of migration on intergenerational relationships, including their social, economic, psychological and bodily challenges to identity and citizenship.
- The inclusion of national representation from Central and Eastern European scientific communities, with particular emphasis on the 'new wave' of EU countries.
- The inclusion of perspectives from both host and migrating communities.
- The development of methodological techniques sensitized to issues of ageing and to migration.

Further networking would address the themes of theoretical, methodological and integrative development discovered during the Exploratory Workshop.



## **Annexe One: Workshop Programme**

**European Science Foundation  
Exploratory Workshop Ref: EW02-175**

**'Intergenerational Relationships, Migration and Ageing: Policy and Behaviour'  
on 18th-21st July 2003  
at Keele University Management Centre, The Hawthorns, Keele Village, Staffordshire**

### **PROGRAMME:**

(Conference Language is English)

#### ***Friday 18th July 2003***

- |             |  |
|-------------|--|
| 12.30       | Lunch & arrivals   |
| 14.00       | Orientation Session One: <ol style="list-style-type: none"><li>1. Introduction by Prof. Simon Biggs</li><li>2. Informal discussions on the purpose of the workshop and exchange of interests between participants as they arrive</li></ol> |
| 15.30-16.00 | Tea/Coffee   |
| 16.00       | Orientation Session Two:<br><br>Presentation by ESF representative and discussion  |
| 19.00       | Dinner - The Hawthorns, Keele Management Centre  |

#### ***Saturday 19<sup>th</sup> July 2003***

- |             |   |
|-------------|---|
| 07.30-08.30 | Breakfast   |
| 09.30       | Formal welcome by Prof. Janet Finch CBE<br>Vice Chancellor of Keele University  |
| 10.00       | Presentation on 'Ageing, Policy & Migration: Issues and Methods'<br>by Prof. Toni Antonucci and James Jackson, University of Michigan |
| 11.00-11.30 | Coffee  |
| 11.30-12.30 | Discussion of the issues raised and feedback  |
| 12.30       | Lunch   |

- 14.00-15.30 Brief presentations on migration figures, old age policies and national issues from Claudine Attias-Donfut, Svein-Olav Daatland, Andreas Hoff and Hans-Joachim Von Kondratowitz, Ruth Kratz, Maria Luisa Marrugat
- Comments and contributions
- 15.30-16.00 Tea/Coffee
- 16.00-17.15 Brief presentations on migration figures, old age policies and national issues from Raffaello Martini, Sandra Torres, Azrini Wahidin, Gerben Westerhof
- Comments and contributions
- 17.35-18.30 Focused discussion in order to identify key themes emerging within and across national boundaries. Small group work on issues arising.
- 19.00 Dinner - Sneyd Room, Keele Hall

***Sunday 20<sup>th</sup> July 2003***

- 07.30-08.30 Breakfast
- 09.15-11.00 Session One:
- The issues and lessons learned from comparative and cross-cultural research by Naina Patel, Ariela Lowenstein, Chris Phillipson
- 11.00-11.30 Coffee
- 11.30-12.30 Translating issues into research questions and appropriate methods:
- 12.30 Lunch
- 14.00-15.30 Session Two:
- Translating issues into research questions and appropriate methods
- 15.30-16.00 Tea/Coffee
- 16.00-17.00 Summary of key conclusions
- 19.00 Workshop Dinner - Saffron Restaurant, Newcastle under Lyme

***Monday 21<sup>st</sup> July 2003.***

- 07.30-08.30 Breakfast and depart
- 09.30 Final Discussion by Planning Group (Biggs, Lowenstein and Katz, in the first instance) on ways forward and future development.

## Annexe Two: List of Participants

| <b>EUROPEAN SCIENCE FOUNDATION<br/>EXPLORATORY WORKSHOP REF: EW02-175<br/>18TH-21ST JULY 2003</b> |  |
|---|--|
| <b>PARTICIPANTS</b>   |  |
| Prof. Toni Antonucci<br>tca@umich.edu   | Professor, Department of Psychology<br>Senior Research Scientist and Program Director<br>Life Course Development Program<br>Institute for Social Research, USA |
| Dr. Claudine Attias-Donfut<br>claudine.attias-donfut@cnav.fr                                      | Director of Research<br>CNAV, France   |
| Prof. Simon Biggs<br>spa04@keele.ac.uk  | Professor of Social Gerontology<br>School of Social Relations<br>Keele University, UK  |
| Mr. Svein Olav Daatland<br>svein.o.daatland@nova.no   | NOVA<br>Norway   |
| Prof. Henryk Domanski<br>hdomansk@ifispan.waw.pl  | ESF  |
| Dr. Andreas Hoff<br>hoff@dza.de   | German Centre of Gerontology<br>Germany  |
| Prof. Ruth Katz<br>ruth@soc.haifa.ac.il   | Chair, Department of Human Sciences<br>University of Haifa, Israel   |
| Dr. Hans-Joachim von Kondratowitz<br>Kondratowitz@dza.de  | German Centre of Gerontology<br>Germany  |
| Prof. Ariela Lowenstein<br>ariela@research.haifa.ac.il  | Department of Social Work<br>University of Haifa, Israel   |
| Prof. Maria Luisa Marrugat<br>llmarrugat@peretarres.org   | Professor of Gerontology<br>School of Social Work<br>Ramon LLull University, Spain   |
| Mr. Elvio Raffaello Martini<br>martini@martiniassociati.it  | Community Psychologist<br>Martini Associati - ASDC, Italy  |
| Naina Patel OBE<br>naina.patel@priea.org  | Director<br>PRIAE, UK  |
| Prof. Chris Phillipson<br>spa05@keele.ac.uk   | Professor of Applied Social Studies and Social<br>Gerontology<br>School of Social Relations<br>Keele University, UK  |
| Dr. Sandra Torres<br>sandra.torres@mdh.se   | Senior Lecturer and Researcher<br>Department of Social and Behavioural Sciences<br>Mälardalen University, Sweden   |
| Dr. Gerben Westerhof<br>westerhof@psych.kun.nl  | Department of Psychogerontology<br>University of Nijmegen, Netherlands   |
| <b>OBSERVERS</b>  |  |
| Dr. Amada Grenier   | School of Social Work at McGill University<br>Montréal , Canada/visiting postdoctoral fellow,<br>Keele University  |
| Professor James S. Jackson  | Daniel Katz Distinguished University Professor<br>of Psychology at the University of Michigan,<br>USA  |

### Annexe Three: Participant Profile/Statistics

| <b>EUROPEAN SCIENCE FOUNDATION<br/>                     EXPLORATORY WORKSHOP REF: EW02-175<br/>                     18TH-21ST JULY 2003</b> |             |        |             |
|---|-------------|--------|-------------|
| <b>PARTICIPANTS' PROFILE</b>  |             |        |             |
| Name  | Country     | Gender | Age Bracket |
| Prof. Toni Antonucci  | USA         | Female | 40s         |
| Dr. Claudine Attias-Donfut  | France      | Female | 50s         |
| Prof. Simon Biggs   | UK          | Male   | 40s         |
| Mr. Svein Olav Daatland   | Norway      | Male   | 50s         |
| Prof. Henryk Domanski   | Poland      | Male   | 40s         |
| Dr. Andreas Hoff  | Germany     | Male   | 30s         |
| Prof. Ruth Katz   | Israel      | Female | 40s         |
| Dr. Hans-Joachim von Kondratowitz   | Germany     | Male   | 50s         |
| Prof. Ariela Lowenstein   | Israel      | Female | 60s         |
| Prof. Maria Luisa Marrugat  | Spain       | Female | 50s         |
| Mr. Elvio Raffaello Martini   | Italy       | Male   | 50s         |
| Naina Patel OBE   | UK          | Female | 40s         |
| Prof. Chris Phillipson  | UK          | Male   | 50s         |
| Dr. Sandra Torres   | Sweden      | Female | 30s         |
| Dr. Gerben Westerhof  | Netherlands | Male   | 30s         |
| <b>OBSERVERS' PROFILE</b>   |             |        |             |
| Dr. Amada Grenier   | Canada      | Female | 30s         |
| Professor James S. Jackson  | USA         | Male   | 40s         |