



Global Migration Governance

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Lifestyle Migration

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Abstract and Keywords

Lifestyle migration is a diverse and lesser known form of migration, which despite its acceleration over the last decades in numbers, scope, and impact, has only recently been the focus of research. Nevertheless, the permanent, temporary, or seasonal settlement of large numbers of foreign residents moving abroad for lifestyle reasons raises important questions about its regulation at a global level, particularly around political rights, welfare resources, and responsibilities for individuals and localities in an international arena. The chapter begins to map out the scale and locations of this phenomenon and shows the very fragmented nature of governance, even within the European Union. It considers why this is the case, and relates the fragmentation to the particularities of leisure migration (as a form of mobility often conflated with tourism) and the historical contexts under which it has emerged. Finally, The chapter examines the arguments that support or resist multilateral regulation, ranging from minimal improvement to more comprehensive governance.

Keywords: lifestyle migration, leisure, retirement, students, European Union, voluntary migration

Introduction

Lifestyle migration is an emerging phenomenon, which has been subject to very little attention in governance of global migration. In charting the degree of governance facing different migration forms, lifestyle migration occupies a place at the least regulated end of the continuum. This chapter considers why this is so, despite the increasing social, environmental, and economic impact of the phenomenon. It argues that this outcome reflects the characteristics of lifestyle migration as a nascent and emergent migration form which is intrinsically

different to other types of migration. It is an anomaly in the scheme of policy categories which normatively frame migration in mainstream policy discourse. Essentially, this is because lifestyle migrants are driven by consumption rather than production. Furthermore, their movement is predominantly North-North, or in some cases North-South. These unique characteristics have led to a neglect of governance of such migrants, especially given no apparent need for regulation on humanitarian, security, or other grounds. From this perspective, any case for introducing further regulation would rest only on its desirability on efficiency grounds or to mitigate the excesses of free market forces. The chapter debates this conclusion, suggesting it becomes questionable when considering the governance of lifestyle migration in a comparative sense. Then, one is provoked into questioning the limited degree of governance on the grounds of equity and social justice for all.

The chapter begins with a discussion of what constitutes lifestyle migration (hereafter referred to as 'LM'). This question is pertinent because understanding the phantasmagoric nature of the phenomenon helps shed light on the limited nature of its regulation (considered in the discussion from page 134). The third section of the chapter explores the political aspects of LM governance, considering whose interests have been served in the current institutional framework. **(p.134)** Finally, it considers how the current apparatus might require critical reflection in the wider contexts of governance of global migration.

What is lifestyle migration?

The term 'lifestyle migration' is applied to a growing number of migrations that are largely undertaken for lifestyle reasons and which do not fit into traditional, existing policy categories of migration. LM is a migration form which is difficult to conceptualize and measure as it blurs with many other mobilities and migration categories. For these reasons, some commentators may consider it debatable whether it is even an adequate or necessary categorization at all. While this section does not minimize the difficulty in defining LM, it argues nevertheless that this is a wholly necessary process to engage with, precisely because the abstract features and specific characteristics of LM explain to a degree the current limited system of governance. First, I outline the phenomenon and give examples of LM and its scope, before considering the unique features of LM.

There is growing evidence of migration processes undertaken for lifestyle reasons across the globe. Although insignificant when considered in relation to labour migration or migration on humanitarian grounds, LM is nevertheless emerging as an important mobility form. Using Britain as a case study, a report by the Institute of Public Policy Research (Sriskandarajah and Drew 2006) shows that at least 5.5 million British people—almost one in ten British citizens—live abroad, while half a million live abroad for part of the year. The Office for

National Statistics (2007) also estimates that 400,000 people, of which half were British citizens, left Britain in 2006 to destinations including Australia, New Zealand, France, Spain, or the United States. The British case-study exemplifies a wider trend of movement abroad in search of a certain lifestyle that as Benson and O'Reilly (2009) argue, has hitherto been overlooked in migration studies. Migrations undertaken under a lifestyle rubric have been explored via other lenses, including the studies of tourism, counter-urbanization and international retirement migration (IRM). Yet, they argue, none of these categories are fully inclusive or unite the various trends found in LM, a phenomenon which for Benson and O'Reilly should be more broadly defined as movement to places which (for those migrants) signify a better way of life (Ibid.).

Related to its nascency, LM has only recently gained academic attention. One sub-theme attracting attention has been retirement migration, a growing phenomenon arising from the global ageing population. For example, Longino observes that between 1995 and 2000, an estimated 2 million people in the United States aged 60 or over had moved across state lines (Longino 2006, cited in Sunil et al. 2007).

(p.135) Studies also document the experiences of Northern Europeans retiring to the Mediterranean (King et al. 2000; Gustafson 2001; Helset et al. 2004; Oliver 2007 among others). Recently, attention has been paid to other streams of retirement migration, such as from the United States to Panama, Mexico, and Costa Rica (Truly 2002; MPI 2006) as well as the emergence of IRM markets in countries in Southeast Asia, such as Thailand (Koch-Schulte 2008).

There are however many other variants of LM which are also, to some degree, motivated primarily in terms of lifestyle. Alternative cases of retirement migration are found, for example, in the return movement to their home country of older Jamaicans from the United Kingdom (Horst forthcoming 2011) or in the multi-local residential strategies exhibited by Moroccans in pendulum migration between European states and Morocco (de Haas 2006). Some attention has also been paid to counter-urbanization and rural relocations within countries, a phenomenon which has also taken on an international dimension (Benson and O'Reilly 2009). Thus, other scholars have focused on British lifestyle migrants on the Costa del Sol (O'Reilly 2000), Mallorca (Waldren 1996), and France (Benson 2007; Geoffroy 2007). Yet there is also interest in many other diverse forms of LM including expatriates in Florence (Trundle 2009) and bohemian 'extended tourists' in Varanasi, India (Korpela 2009 and see Benson and O'Reilly 2009 for more examples).

Despite the apparent growth of the phenomenon, LM involves fluid populations which are difficult to pin down and count with accuracy. Often few data exist on absolute numbers of LM (as the Migration Policy Institute(MPI) observes in relation to Panama and Mexico, for instance). Drake and Collard refer also to the

'notoriously hard-to-quantify' but 'numerous and stealthy' numbers of Britons emigrating to France (Drake and Collard 2008: 216). There are many reasons for this deficiency. In large part, it is related to the way migrancy patterns in LM often extend from pre-existing tourist circuits (see King et al. 2000; O'Reilly 2000). Gustafson thus summarizes in the case of retirement migration in Spain that migrant behaviours exhibit a 'continuum of mobility' (Gustafson 2008: 453) ranging from a short period of transient sojourning to permanent to long-term or permanent residency abroad (O'Reilly 2000). In these circumstances, many lifestyle migrants fail to register as residents (see examples in Spain in King et al. 2000; O'Reilly 2000 and India in Korpela 2009).

Furthermore, immigration authorities' estimates and data do not capture the many lifestyle migrants who come to their destinations on tourist visas, a common practice noted, for example, among lifestyle migrants in India (Korpela 2009) and Mexico (MPI 2006). As such, statistics pertaining to LM are often weak and vastly underestimate its scope, a situation with potentially immense impacts, as discussed later in the chapter.¹ There is however evidence of LM as a growing trend, although the degree varies according to source. For example, using the example of the Central American states, the MPI reports that in Panama, the number of visas issued for US citizens in the visa categories used by retirees tripled between 2003 and 2005 (MPI 2006: 43) with Panamanian **(p. 136)** officials reporting a surge of migration since 2003. In Mexico, Truly (2002) reports that government officials quoted 5,000–6,000 full-time residents, but that in winter, locals' estimates range between 12,000 and 40,000.

In understanding LM, however, there are two clear factors which set LM apart from other migration forms: first, the motivations for LM, and second, the particular characteristics of those engaging in the process. The key analytical difference between the movements loosely defined as LM and other types of migration is that LM relates to *consumption* rather than *production*. While it is recognized that all migrations are driven by mixed motivations and that lifestyle benefits are likely to be an important factor in many other forms of migration, in LM, the aspiration for a desirable lifestyle is the primary motivator (Oliver 2007). Thus, lifestyle migrants move to the destination directly in order to consume tangible goods, including lower priced property, land, or hospitality, although other inalienable resources such as climate, environment, a less-demanding lifestyle, nostalgia, love, and social and educational capital may be equally persuasive in their motivations. To this end, LM must be understood more fundamentally as a cultural phenomenon (Oliver 2007) related to wider structural, economic, political, and social changes in 'Western' states in the twentieth century (Giddens 1991; Beck and Beck-Gernsheim 2002). This has seen individuals become directed more towards their own self-projects, as 'individual fulfilment is the guiding rationale—or vocabulary of motive—for choice and decision making' (Hockey and James 2003: 107). Travelling abroad to

experience a more desirable lifestyle is a process of non-essential consumption viewed as aiding individuals' reflexive search for self (Oliver 2007).

Of course, this definition is open to contestation. It is clear that, for example, consumption is not the only goal of lifestyle migrants and there may be other value-added benefits of moving. Lifestyle migrants may seek economically favourable circumstances to maximize pensions or tax advantages, as discussed in the following section. Likewise, some migrants may subsequently work, often developing their own businesses as self-employed entrepreneurs (see Stone and Stubbs 2007 and Drake and Collard 2008 on LM in France). Yet even in such cases, any economic advantage or employment advancement is typically not the central reason for their movement. It is rather the opposite in many experiences of LM where migrants seek degrading employment, as is evident in the trend towards 'downsizing' and shown in migrants' rhetoric of escaping the rat-race which is common in many examples of LM (Benson and O'Reilly 2009; Oliver and O'Reilly 2010). Yet, consideration of these mixed motivations demonstrates the potential for blurred boundaries with other sorts of migration, particularly labour migrations.² However, in the LM cases, it is that *consumption* is the primary motivator over any of the other reasons.

The second feature defining LM is related to the particular characteristics of those migrating. Lifestyle migrants tend to be individuals or families from Northern countries, who move to other Northern states or sometimes to other Southern (**p.137**) states. For instance, an examination of one facet of LM, IRM, shows its development as a form of intra-regional migration from Northern European to Southern European countries or from North America to Panama and Mexico. Now it is expanding rapidly, with new lifestyle possibilities for wealthy retirees increasingly marketed in Southern destinations including Egypt, the Gambia, Thailand, Malaysia, Indonesia, and the Philippines. In this sense, patterns of LM are vastly different from the majority of international migration which exemplifies reverse patterns of movement from South to North or South-South.

In terms of characteristics, LM can also be understood as often a form of life stage migration, with consequent impacts on the patterns of mobility lifestyle migrants' exhibit. Thus, as I have mentioned, a large constituent trend of LM is retirement migration, as retirees seek a better climate and fulfilling social environment in which to spend their retirement years. Yet at the other end of the life course spectrum, international student mobility, which has received 'virtually no attention' in standard academic literature on migration, may also be arguably considered another category of LM (King and Ruiz Gelices 2003: 230). The fact that they are driven by investment in their personal capital rather than consumption precludes their inclusion for further discussion in this chapter, although compellingly, there is a growing body of research suggesting international student mobility is motivated by experiential and lifestyle goals

rather than strictly economic ones,³ in which transnational experience gained by studying abroad counts as a form of ‘mobility capital’ (Findlay et al. 2006: 293; Amit 2008).

Drawing attention to definitional difficulties is not only interesting for its own sake, but of fundamental importance for understanding the limited degrees of governance in this arena. LM—as a consumption driven, North–North movement—reverses the normative assumptions of global migration inherent in much global policy discourse. It is not conceived of as a separate policy category, as in other cases, because it is not perceived to bring the same sorts of problems as other migration forms, especially in terms of migrants' recourse to public funds. Correspondingly, institutional arrangements are framed in a way to enable—rather than restrict—certain people to engage in this apparently unproblematic form of migration. Yet as I shall go on to explain, these governance arrangements expose lifestyle migrants as, in Bauman's useful distinction (1998), exemplars of ‘tourists’ rather than ‘vagabonds’, with institutional frameworks adapted to facilitate their mobility. I outline these existing systems of governance in the following section.

Institutions governing LM

This section describes the framework that regulates institutional responses to LM, considering formal and informal structures that contribute to multilateral, regional, interregional, and bilateral regulation.

(p.138) As referred to previously, LM is largely overlooked in international fora on international migration, provoking at best little more than brief mention as an ‘exception’ to the other more important dimensions of international migration. Global frameworks for cooperation and coordination on international migration issues have recently been developed in relation to general migration, for example, through the lens of international collaboration or for economic purposes, but they do not consider LM an issue in its own right. For example, the recently published research compendium of the International Organization for Migration (2007) makes only one indirect reference to leisure, tourism, lifestyle, and retirement. The same is true for the report of the Global Commission on International Migration (2005), an agenda for the future on international migration, where there is no meaningful consideration of LM at all.

One reason for its neglect in international fora is that LM is considered adequately governed already through existing regulation of international travel, including consular arrangements and the international visa regime (for a detailed explanation, see Koslowski, this volume). In particular, governance of LM falls under the Vienna Convention on Consular Relations (1963). This long-standing normative framework codified the many bilateral treaties aimed at allowing consulates, by mutual consent, to intervene on behalf of its own nationals in foreign territory. Consulates provide a variety of legal services that

may be of relevance to lifestyle migrants. For instance, they may assist with the estate of a citizen who dies abroad or investigate the safety of any citizen. Under this framework, Article 36 requires that any nation which arrests or detains a foreign national allows them to access his or her consulate, who may then work to ensure judicious treatment as well as communicate with family members.

Visas also frame and set down important conditions for migrants to be able to move freely to individual countries, with great variation in the conditions required. Visas are established at a national level—although with some regional agreements as discussed below—and are inclined to the state's national economic interests. For this reason, lifestyle migrants tend to be favoured, because they hold much consumer power. To give an example, in the United States, a country famed for its restrictive immigration policies, there is currently ongoing debate among trade groups about a 'Silver Card' being introduced to ensure more favourable access for lifestyle migrants. The card creates a visa category for foreign citizens who own US property, do not work, and have enough documented income to retire in North American destinations such as California or Florida. The rationale for the card is essentially because these migrants represent potentially millions of dollars of investment income (Moscoso 2008). Such agreements already exist elsewhere at a bilateral or regional level, for example, between Central America and the United States, New Zealand and Australia. In particular, the North American Free Trade Agreement (NAFTA) has led to greater access of US products and services and removed barriers to migration (Truly 2002). **(p.139)** Thus, in Panama, the government has created two visas to specifically target US retirees, the *Turista Pensionado* and the *Rentista Retirado*, the first offering indefinite right to remain, and the other which requires five-year visa renewals and the depositing of large amounts of money (around US\$225,000) in the National Bank of Panama, which must yield at least US\$750 a month in interest (MPI 2006). There are also regional avenues for retirement migration through NAFTA in suggestions for expedited entries of 'trusted travellers' raised by Hufbauer and Vega-Cánovas (2003). This would include a NAFTA retirement visa, allowing retirement in any of the three NAFTA countries.

These governance systems have obvious consequences in terms of equity when viewed in a comparative sense, as they effectively ensure freedom of movement for certain desirable migrants (Bauman's 'tourists'), while keeping out less desirables who cannot meet visa requirements predicated on income (the 'vagabonds'). This is also underlined by the limited degree of enforcement of registration requirements for lifestyle migrants who may aim to be misleading about their residency (Schriewer and Berg 2008). It also comes down to the generous flexibility often given in visas defined as 'tourist visas' (whereby 'tourists' can stay for most of a year or for extended periods) but which in practice, more adequately represent LM. For example, Mari Korpela (2009) discusses the exploitation of exceptionally long 'tourist' visas among bohemian

lifestyle migrants in Varanasi, India. Depending on nationality, lifestyle migrants can live under the guise of a tourist visa for up to ten years. Although officially one is expected to reside as a tourist (in hotels, for example) in practice, locals rent rooms to foreigners to gain income, while visa renewals are subject to corruption. Rules for visa renewal, such as having to leave the country every six months, are also loosely interpreted, as Westerners simply pay a visit to the border of Nepal for a few hours and return immediately.

Such examples reveal the ways that the regulation of LM reflects a Northern prejudice. This concurs with Gamlen's observation (this volume) of how bilateral agreements are almost exclusively developed by Northern countries. As he argues, they are often related to unconnected diplomatic rather than domestic agendas and as such are staggeringly ad hoc, with often unjust consequences. A clear example of this, as Gamlen points out, is in relation to the payment of UK pensions to British citizens outside the European Union (EU). Unless the country of residence has reciprocal links with the United Kingdom, state pensions are not index-linked, but frozen at the rate at which the migrant left the United Kingdom or at the rate when they first received it (Age Concern 2007). Such bilateral governance is ad hoc, random, not transparent in motives, and amounts to something of a country-code lottery in migrants' access to services and provisions.

Beyond the visa regime, governance of LM has also been developing regionally, although again, not without certain implications. Perhaps the most obvious example is seen in the multilateral agreements for free travel between European Economic Area member states and the creation of 'the European **(p.140)** citizen' via the Maastricht Treaty (1992). As a consequence, any intra-European migrant gains full access to the range of goods and services to which any citizen of the member state would be entitled. However, where regional governance exists, it is not directly addressed at LM governance, but an effect of the principle of freedom of movement (Treaty on European Union, article 39). To this end, governance of welfare, health, benefits, pensions, taxes, electoral rights, etc. is conducted via national legislations, in which lifestyle migrants experience less often the deliberate governance of migration but rather an array of more or less unintended 'side-effects' of national legislation.⁴

One arena where this is evident is in terms of health and social care, in which legislation fails to address the fluid mobility of LM. As Schriewer and Rodes García (2006) point out, legislations were designed for workers and tourists, of which lifestyle migrants (or in their discussion, retirees) fall into neither category. The European legislation on health and social care is also directed to the case of persons with one usual place of residence and excludes the possibility that people may have two or three. Furthermore, there is nothing to address the disadvantages a citizen might confront when confronting 'different

worlds of welfare' and the more or less generous national provisions in different member states (Ackers and Dwyer 2002: 8).

In practice, the governance directed at lifestyle migrants is often poorly understood, exposing them to both exploitation or to situations whereby they unwittingly (or in some cases wittingly) contravene national laws. In consequence, there has been the development of an additional layer of ground roots provisions and commercial ventures aimed at smoothing the legal and economic transitions in moving and living abroad for lifestyle reasons. Networks of non-governmental organizations (NGOs) and local migrant welfare associations play important roles in filling in the knowledge gaps around entitlements and responsibilities. For instance, the NGO Age UK (formerly Age Concern) developed an 'easy, helpful, honest' outline (2007) to aid those moving abroad in retirement. And within my own ethnographic research on retirement migration in Southern Spain, foreign branches of national institutions and charities were keen lobbyists in local and regional campaigning. One of the local branches of the British Legion on the Costa del Sol campaigned to national headquarters in the United Kingdom, for example, to improve rights of repatriation for infirm and economically struggling retirees, after a number of cases of their members struggling with the limited care services common in mother-daughter welfare systems of Southern Europe (Oliver 2007). The need for such provisions speaks to the many gaps exposed as a result of reciprocal national provisions for health and social care.

This case explains also the growing number of private sector agencies who are emerging as strong actors in LM provisions, especially in IRM with regard to health care for older retirees. For instance, in the case of intra-European LM, despite the provisions of reciprocal arrangements, retired EU migrants regularly **(p.141)** meet their needs via a mixture of public and private provision. As Dwyer (2000) points out, they also do so by weighing up the disparities in standards of public health care on offer in different EU countries. As he also argues, many Northern European retirees living abroad, 'continued to make use of and were keen to retain any rights to public health care in the nations they had left behind' (Dwyer 2000: 366) either by returning permanently or retaining domicile while abroad (see also Gustafson 2001). His work with Ackers (2004) demonstrates the considerable skill used by individuals in negotiating access to resources. Yet Helset et al. also refer to the evolving 'transnational elderly care' (Helset et al. 2004: 93) developing for Norwegian retirees in Spain, including a municipality which provides trainee posts for Norwegian students in social and care work and private home-help services for Norwegian retirees funded by Norwegian authorities or private insurance (cited in Gustafson 2008).

The fact that freedom of movement—which developed on the back of freedom of trade—underlines regional governance of LM demonstrates that little thought has been given to the social and economic consequences in terms of claims

placed on systems (Schriewer and Rodes García 2006). In Europe, it is often overlooked, for example, how lifestyle migrants have (in common with other categories of migrants) the right to vote in local and EU elections following the Maastricht Treaty on the European Union (1992, Article 8). Until recently, the fearful anticipation by host countries with sizeable expatriate communities of the election of foreign councillors to represent migrant interests has largely seemed unwarranted. Drake and Collard reveal that British migrants in France showed, 'relatively poor knowledge and understanding' (Drake and Collard 2008: 227) when questioned on the French political system, a situation echoed among lifestyle migrants in Spain (Rodríguez et al. 1998). However, other evidence emerging from Spain points to the 'mushrooming of expat-dominated political parties' (Wood 2007). These have been particularly established in response to perceived poor national regulation of planning laws which have allowed corrupt municipalities to sell land, a process directly impacting lifestyle migrants. Similarly, the clout of expatriate parties is documented by the rapid *volte face* of the French government in 2008 when it retracted its decision to suddenly withdraw access to health care for early retired LM after pressure from expatriate lobby groups and British officials (Samuel 2008).

In summary to this consideration of institutional provisions for LM, it is evident that while there are some indications of emerging forms of regional and even global polycentric governance of aspects of LM, the main regulation for LM is through visas and bilateral agreements. There are few fora or institutions strategically engaging with people migrating for lifestyle reasons. Multilateral governance beyond visa controls is rather embedded in policy focused on other concerns including health/social care and trade. In this sense, governance of LM emerges as a side effect, rather than a deliberate governance strategy. Any future international dialogue for governance would furthermore **(p.142)** have to engage with the polycentric nature of LM governance, especially given the emergence of other stakeholders, such as NGOs or, more particularly, private sector actors.

What drives the politics of LM governance?

The final aspect to consider in this debate is why such limited and haphazard regulation of LM has emerged. Essentially, I suggest that the marginalization of LM in the debate about migration in the international community is reflective of the way that LM has developed as a North-North migration, only recently expanding into a West-East and North-South migration. If as Betts argues (this volume), states' interests in international politics are self-oriented and predicated on maximizing their economic and security interests, this direction of movement is neglected because it is normatively viewed as non-problematic or even favourable for all states concerned. The question is, how has the situation arisen that LM is seen as unproblematic? What drives this interpretation? Is the

'benign' interpretation of the phenomenon enough of a plausible justification for the current LM governance arrangements?

First, LM is seen as unproblematic by sending countries. There are no norms of controlling exit by the sending country, and the Northern states so often affected by this phenomenon do not object to the outmigration of their citizens. They may be marginally concerned with the loss of tax income and may wish to stem the resources leaving the country, but it is also the case that lifestyle migrants are often marginal populations. Particularly in the case of retirees, lifestyle migrants are often in- or under-active economically. As such, states may even perceive a benefit to the associated reduced welfare demands levied through outmigration. Their indifference to LM, especially by older migrants may even reflect a general ageist bias of policy-makers who view the ageing society as problematic, with older people constructed as dependent and a burden on states (Phillipson 1982).

Second, LM is considered unproblematic by receiving countries. As amenity-seeking migrants, lifestyle migrants present little in the way of a security threat, particularly in the EU in an era of European integration, when migrants hail from other Northern countries. Yet more important is the fact that lifestyle migrants fall into a category of desirable migrants due to their spending power and as such, receiving countries and their businesses have a strong incentive to encourage LM as part of their export markets. LM can be viewed as a particular form of trade: the consumption of a country's immaterial goods—of climate, environment, educational services, and lifestyle in exchange for investment in property, goods, and services. As a result, the limited regulation around LM has developed very much in response to the demands of private sector actors, especially in real estate, health care, and financial services, who almost **(p.143)** dogmatically profess concern for freedom over regulation. The role of real estate corporations is particularly influential, as they target specific LM groups as niche markets and exert pressure on governments for looser restriction and press for states to actively encourage LM through attractive immigration policies. This is evident, for example, in the vocal lobbying by estate agents for the 'Silver Card' visa that would allow foreign citizens to retire in the United States (Moscoso 2008).

The importance of LM for receiving countries' export markets therefore is marked by a proliferation of open-door policies to lure affluent migrants, particularly in developing nations, through the promise of 'lifestyle' and inexpensive domestic labour. To this end, there is emerging evidence of policy initiatives from the developing South to capture this niche market of desirable migrants. For example, Malaysia operates a government-endorsed long-term stay visa programme, the 'My Second Home' Program (MM2H) to overseas retirees. Certain 'desirable migrants'—often early retired and/or economically inactive—can stay in Malaysia on a (renewable) social visit pass with a multiple entry visa, while still retaining their citizenship. For the price of opening a fixed

deposit account or show of monthly pension income, they can also benefit from other incentives including tax concessions and the possibility to invest and own businesses in the country. The official sponsor for the programme, Comfort Life Corporation, appointed by the Immigration Department of Malaysia, intones prospective new migrants to 'Retire Early, Retire Rich' ([www/12retireinmalaysia.com/index.htm](http://www.12retireinmalaysia.com/index.htm)). Similar incentives exist in Panama and Mexico for US retirees and Canadian snowbirds. In Panama, a package of beneficial tax and property ownership policies are offered to those entering the country on pensioner visas, including, for example, the ability to bring household goods and vehicles into the country without paying import taxes. Another example is of retired Canadians in Mexico, who are subject to the Canadian/Mexico Tax Treaty, which sees those living out of Canada for at least 183 days a year able to reduce their taxes on pensions and investment income by 15 per cent and all future capital gains tax to 0% (www.retiretoajjic.com/Articles.htm).

Such examples demonstrate the way LM is perceived as a lucrative market, in which limited regulation aids a country's economic development. However, the neglect of this apparently non-problematic form of migration is not as benign as first appears. An alternative reading sees LM as the triumph of brute capitalism or 'a new and more efficient form of colonialism' (Chesterman 2008: 39). This is because when Southern states are receiving states, there is little or no scope for them to demand strict conditions for entry, as they are effectively in competition with other developing or developed nations to attract financially secure migrants. This is confirmed by the MPI (2006) study of IRM to the Central American states, where migrants were observed to be cognizant of the variety of options open to them and variations between countries' immigration policies.

(p.144) Attention can also be drawn to the ways that private interests define the structures of global migration governance in this domain. The private sector plays an important role in lobbying for the existence and further creation of new visa categories to attract 'desirable' and resource-rich migrants to fuel economic development. Some may argue that this freedom of movement is perfectly logical, on both receiving and sending countries' part. But aside from the unforeseen social and environmental consequences of LM, it is clear that this logic does not extend to comparative cases of migration undertaken in a reverse direction, whereby the configuration of interests in the receiving states is markedly different. There, it has rather been the case of strengthening immigration controls against undesirable 'vagabonds' (Bauman 1998). With this comparative perspective in mind, it is necessary to consider finally whether there may be reasonable grounds for global governance of LM.

A normative case for global governance of LM?

The final question the chapter engages with is whether a normative case can or should be made for more international dialogue and governance in relation to LM. Global governance refers to the participation of multiple interest groups in

the management of common affairs, to both engage with diverse interests while achieving cooperative action. It relates to shifting the level of human cooperation to the global rather than national level. As I have argued, in the case of LM, there are limited existing institutional structures for governance and this status quo does not seem to be generally regarded as problematic by the states concerned. As conditions prevail, there seems to be little grounds for arguing for more global governance, apart from perhaps, an efficiency case for market regulation. And with surely more pressing issues for global governance currently provoking attention, including human rights, economic development, security, the control and treatment of infectious diseases, and international trade in other fields of migration (where forced, irregular, or exploitative), there may be significant grounds to agree. However, as the chapter has shown throughout, it may be pernicious to acquiesce to this 'logical' conclusion, particularly as it overlooks the equity implications of existing arrangements. In this section, the chapter concludes with a consideration of the basis on which a normative case for global governance of LM can be made.

One obvious argument in support of stronger regulation is that purely the increase and ever-expanding horizons of this form of migration exerts some form of pressure for research and governance. Quite simply, not enough is known about the effects of this emerging migration form. The neglect of LM is particularly puzzling when considering the way that other areas of global governance of international migration, such as the issue-area 'migration and development' is discussed. Here, links of migration and development are **(p. 145)** interpreted as the beneficial reception of economically active migrants and the knock-on effects of migrants as agents for development in sending states. Interpreting migration and development from an LM perspective posits a very different understanding of these links, as [non-return] migration *to* (rather than from) Southern states can equally be interpreted as an engine for development. Yet this presumption of LM is questionable; it is well documented that the presence of LM often precedes the development of ethnic—not solely native—entrepreneurship in the destination societies as services are developed in response to the needs of the expatriate society (Gustafson 2008). Certainly, more research is required.

However, even if receiving states continue to see LM as an important part of their export market, often less anticipated are the longer term implications related to these poorly registered populations, both in terms of environmental impacts, social integration, and fiscal challenges to the host state (King et al. 1998). While LM—like tourism—is largely welcomed by host communities as a source of economic development, there is (often post-hoc) realization that its economic advantages are accompanied, if unchecked, by irreversible environmental damage, cultural alienation, and economic dependence. This is particularly evident in the Costa del Sol, one of the earliest sites for LM in Europe, where the sprawling developments have led to an increased water

runoff and wider impacts in terms of erosion and desertification (Aledo and Mazón 2004). Other effects include the reduction of local biodiversity, deforestation, forest fires, and water pollution. Truly (2002) also documents the environmental impact created in part by the grand homes, swimming pools, and gardens of US lifestyle migrants in the Lake Chapala district of Mexico. As such, many of the concerns of the heritage sector, ministries of culture, and municipal councils around tourist development are relevant to the related issue of LM. Yet, these consequences continue to be subjugated to the positive effects of development, as evident in the fact that Spain—despite the negative impacts witnessed as a result of unchecked development—is still considered uncritically a paradigm case that provides a positive example for imitation elsewhere (Mantecón 2008).

In terms of social effects, some research demonstrates already the limited integration possible in cases of LM, much of which relates to the characteristics of migrants. The migrants have limited integration channels available in other forms of migration, such as through work or schooling (King et al. 2000) and as such, tend to form their own inward-looking communities (O'Reilly 2000; Oliver 2007). In some destinations, there are specific problems related to the migrant populations involved. For example, Koch-Schulte observes how planning in Udon Thani, Thailand, is unique, 'due to the homogeneous makeup of male retirees who bring with them a host of Western cultural values and problems related to bars and sex tourism' (Koch-Schulte 2008: 3). And certainly the combined effects of limited statistics and conflation of lifestyle migrants **(p.146)** with tourists has the potential to place unprecedented strain on the welfare resources of receiving countries, particularly when funding allocations for health care are made using a capitation formula (Helset et al. 2004; Schriewer and Rodes García 2006). From this point of view, a laissez-faire approach to the issue radiates a less innocuous hue than first appears. In relation to retirement migration, it could even be considered as the shifting of increasing responsibilities and costs of social and medical care for an ageing population elsewhere.

The effects of limited governance of LM are also often felt at an individual level, providing compelling moral reasons for further attention to governance in this arena. There are numerous sensationalist accounts in the media of 'the dream' turning into a 'nightmare', but stereotypes of lifestyle migrants as wealthy and self-sufficient belie the reality that LMs represent an economically diverse range of individuals, some of whom are not affluent and find themselves subject to foreign legal systems with little social or economic capital with which to negotiate them. O'Reilly draws attention to Northern European lifestyle migrants in Spain who—in contrast to the strata of flexibly working transnational elite—had 'little to lose' (O'Reilly 2007: 282), being unemployed, redundant, or struggling economically. Their move to Spain to 'escape' the United Kingdom was experienced anxiously, as she comments:

This research revealed extensive evidence of British migrants working in the informal economy, paying no income tax or national insurance contributions, relying on emergency state health provision or inadequate private health insurance, who are confused about what they are supposed to do to be legal residents, who are neither registered with their town hall nor have residence permits, who do not know who to turn to in times of difficulty, who cannot speak the language adequately and come unstuck when they need to call the police or an ambulance.

She documents that in addition to no longer having entitlements, or paying contributions to British social security systems, others find themselves on uncertain legal grounds regarding property and land ownership.

Similarly, in the case of IRM, while Ackers and Dwyer (2002) document the skill of many older retirees in negotiating one or more welfare systems in Europe, there are equally other compelling and less-well-known stories of those who fall between the gaps raised in transnational migration between two or more states. There are a minority of cases in which people find themselves destitute and unable to fund the social and medical care they need (Hardill et al. 2005; Oliver 2007). In my own research, I witnessed a case of a woman of limited financial resources suffering from increasing dementia, with her friends unable to provide the round-the-clock care she needed. They had been discussing how to physically get her on a flight to the United Kingdom, so that she would be cared for by local social services at the British airport. Helset et al. (2004) also point out in relation to Spain, that although immigrants may **(p.147)** put pressure on receiving countries' resources, there is equally uncertainty for municipalities in the sending countries as to whether or not large numbers of retirees will return 'home' and unexpectedly demand costly health and social care upon their return. This is particularly borne out by observations that although LM is often planned as a long-term and permanent endeavour, many people return to their home countries as a result of unforeseen circumstances, such as the death of a partner or deterioration in well-being (see Oliver 2007).

The above argument relates to a further rationale for governance, simply that at present, the debate on governance of migration seems to be captured in discourses of political internationalist ideas, functionalist economic rationales, or strategizing between states, rather than being needs based. Moral imperatives direct those interested in global governance to engage with a more grounded understanding of people migrating and receiving, their needs and how they are met. Moreover, following the cultural trend of individualization and competition (Beck and Beck-Gernsheim 2002), public services are increasingly under scrutiny and even diplomatic services will have to take into account the drive towards personalized services. As I pointed out, even within the relatively straightforward case of the EU, states could do much more in terms of information provision about basics, such as repatriation in cases of illness or

death. Migrants are often left to the mercies of private health insurance agencies, which have no overriding interests to account for their actions. More clarity in the development of international administrative law would ameliorate the consequences of negotiating complex and specific legal systems, particularly at times of great distress, illness, or death (Oliver 2004).

The examples given here suggest a lack of clarity in legal and administrative systems. But perhaps more strongly they speak of an inability of existing state and welfare systems to adequately respond to the reality of fluid mobility, as exhibited in LM. With increased mobility, the visa regime also encounters new challenges which cannot be answered under existing frameworks. For example, if a dual national lifestyle migrant resides as a lifestyle migrant in a third country, such as Malaysia, when they require care, which state has responsibility for its national? The limited awareness of such issues reflects the absence of a clear picture on LM as a burgeoning yet little-explored phenomenon. Certainly, this justifies at the very least further monitoring in both scope and effects of LM.

This brings me to the final, but perhaps most convincing argument for governance: on ethical grounds. LM shares many characteristics with other types of migrations, but it is clear that lifestyle migrants enjoy freedom of movement through favourable visa regimes. Thus, some of the rarely discussed consequences of LM raised from empirical observation in this section have resonance with the experiences of irregular migrants. Yet it is important to stress that under existing arrangements, because of the origin of the people **(p. 148)** involved in LM, they are unlikely to be conceived as undocumented migrants, nor treated as such in enforcement. Indeed, there are clear equity implications when considering LM in a comparative sense, particularly when arguments about access to welfare and public funds for other types of migrants are used to justify strict immigration controls. Lifestyle migrants are subject to preferential treatment in visa conditions because they are perceived as a category of 'desirable migrants' who bring significant economic and cultural capital to the receiving state. Their presence is viewed often by host countries in a similar vein as tourism, as a desirable form of economic development. Yet these assumptions frame certain arrangements which discriminate unfairly and on the grounds of wealth alone between the desirable 'tourist' or lifestyle migrant who has enough consumer power to be of interest to the receiving state's export industry and the 'vagabond', who does not.

Conclusion

The chapter draws attention to the emerging and growing phenomenon of LM. The unique characteristics of this migration form as a North–North or North–South movement has meant its marginalization as a legitimate subject in the emerging global fora on migration. At a global level, regulation of LM is through visa regimes, with degrees of mobility dependent on capital. Other regulation at the regional level is often of a very fragmented and embedded nature, with

lifestyle migrants subject to ad hoc national legislations on issues including health and social care, pensions, tax, and property ownership. Yet as the chapter has shown, the assumption that there is no need for governance ultimately reflects the unchallenged dominant interests of Northern states in debates on international migration.

In considering the case as to why there would be any benefits gained through developing more global governance in this migration form, beyond efficiency grounds for market regulation, the discussion highlights that there are also moral imperatives that support a normative case for global governance. Ultimately, in terms of interrogating the causes of LM, especially as it expands beyond the confines of North–North migration, questions need to be raised as to the status and consequences of LM. Existing governance responds to an interpretation of the phenomenon as of benign influence, a win-win phenomenon to be encouraged by both sending and receiving countries. Another governance may yet respond to the inequity raised by existing frameworks which privilege only those who have the financial means to choose where to migrate. Or, as Bauman (1998: 86) summarizes most succinctly:

The dimensions along which those ‘high up’ and ‘down’ are plotted in a society of consumers, is their *degree of mobility*—their freedom to choose **(p.149)** where to be. Those ‘high up’ travel through life to their heart's desire and pick and choose their destinations by the joys they offer. Those ‘low down’ are thrown out from the site they would rather stay in, and if they do not move, it is the site that is pulled from under their feet.

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Notes:

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(1) As King et al. (1998: 108) argue with regard to international retirement migration in Spain, 'Given that officially registered foreign populations account for more than half the total populations of at least two municipalities in Spain... the impact of under-registration in these areas especially, but more generally throughout Mediterranean Spain is potentially immense.'

(2) This blurring is evident in labour migration, where lifestyle considerations influence the choice among a number of possible receiving countries. Yet, among lifestyle migrants who subsequently work, the aspirational dimension is the primary driver rather than purely economic considerations.

(3) Amit's research (2008) exposes the difference in official and students' interpretations of the benefits of international student travel. Where institutions envisage the process as training or creating, 'a new kind of contemporary citizen', students hold rather more profane visions of the process as 'just...

something to do', or 'time out' in which they gravitate towards others in the same situation.

(4) Thanks to Per Gustafson for this observation.

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