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International Elderly Migration in Hungary*

SUMMARY

The paper examines international elderly migration (IEM) related to Hungary. Little effort has been made to investigate this increasingly important element of human migration in Central and Eastern Europe. The general objective of this study is to contribute to filling this gap. IEM is investigated using register-based data on migration flows, stocks and citizenship statistics. The analysis focuses on the time series but the paper also considers the historical context and the recent patterns of IEM. The aim of the research was fourfold. Firstly, we tried to establish when IEM related to Hungary began. Secondly, we detected the accelerating character of this phenomenon. Thirdly, we were able to identify the main macrofactors influencing the level of IEM. Fourthly, the main result of the study was that it allowed exploration of a Hungarian peculiarity. "Pension seeking" is one very distinctive feature of IEM and is in many ways a legacy of the state socialism period. Therefore, its emergence on such a large scale is the result of the transformation period. We suppose that pension-hunting type migration will be temporary in nature. Conclusions about the motivational structure of IEM are discussed with reference to policy implications in the light of the ageing population structure in Hungary.

KEY WORDS: international elderly migration, ageing, citizenship, pension system, migration policy, Hungary

Introduction

The later-life upsurge in age-specific migration rates was a sign of the newly emerging migratory phenomenon in the developed world (White, 1980; Warnes, 1982; Rogers, 1988). The growing migratory intensity among elderly people was further proof of the selectivity of migration by age, in addition to the very high migration probability in young adult age groups and low mobility in middle-aged groups. The selective character of migration also complied with the former widely accepted theoretical considerations of spatial and social sciences, so extensive research interest in later-life migration began in the 1980's (Biggar, Cowper and Yeatts, 1984; Hogan, 1987; Litwak and Longino, 1987; Rogers et al., 1992; Warnes, 1992; Frey, 1995; Millington, 2000). Naturally, this phenomenon had been first noticed earlier, since the process had occurred sporadically before World War II (King, Warnes and Williams, 2000; Warnes, 2001).

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However, mass elderly migration started from the 1950's and developed as a diffusive process. Numerical expansion combined with spatial spreading and the growth of completely new forms in advanced societies (Speare and Meyer, 1988). The spatial diffusion was twofold: from regional to inter-regional within individual continents (special cases from internal migration to international migration);¹ and from continent to continent from a strictly quantitative point of view.

In North America, the interstate movement to the Sunbelt started in the 1950's, later followed by the "snowbirds" who crossed the Canadian-US border each winter (McHugh, 1990; Haas and Serow, 1993; Longino, 1995; Rogers and Raymer, 1999). The first phase of the mass international retirement migration of US citizens was the emigration to Mexico and the Caribbean from the 1970's and, after that, all over the World (Otero, 1997; Truly, 2002; Walters, 2002).

In North Western Europe, the internal elderly migration process began in each country during the 1960's, but the initial date and the intensity of prevalence (spreading) varied from country to country. Karn's pioneering studies (1977) explored the European counterpart of the American Sunbelt-oriented movement: amenities-led older migrants heading for the Seaside. However, the tourism related movements of old people were not the driving forces of research but rather the study of spatial redistribution of old people and counter-urbanisation processes combined with return migration and family reunification: in France (Cribier, 1982), in the United Kingdom (Warnes, 1982; Cribier and Kysh; 1993), in The Netherlands (Vergoossen and Willekens, 1987), in Belgium (Poulain, 1988), in Norway (Myklebost, 1989), in Sweden (Obergh, Scheele and Sundstöm, 1993; Niedomysl, 2005), in Germany (Rohr-Zanker, 1989), in Italy (Bonaguidi and Abrami, 1992), in Spain (González and Puebla, 1996), in Portugal (Peixoto, 1996), in Estonia (Ainsaar, 2003) and in Finland (Pehkonen, 2005). Buller and Hoggart's study (1994) was the link in literature from the spatial distribution-orientation to tourism-led international retirement migration. From the mid 1990's to the early years of the new century, the flows of North Western Europeans to the Mediterranean basin became the mainstream contribution to international retirement migration (King, Warnes and Williams, 1998; Rodríguez, Fernández-Mayoralas and Rojo, 1998; Williams et al., 2000; O'Reilly, 2000; Friedrich and Warnes, 2000; Huber and O'Reilly, 2004; Casado-Díaz, Kaiser and Warnes, 2004). Most of the studies predicted strong growth tendencies and diversification in popular destinations in the near future (Montanari, 2000; Williams et al., 2000; Casado-Díaz, Kaiser and Warnes, 2004; Warnes et al., 2004). Moreover, after the Croatian and Turkish coast, the Black Sea coast of Romania and Bulgaria is already seen as a potential area for retirement migrants, primarily German retirees (Longino and Warnes, 2004).

We can see that a considerable number of contributions about this series of subjects was published over a relatively small time interval, in addition to its broad treatment

¹ International elderly migration is qualitatively different from national migration in later life because of challenges involved in terms of language, religion, laws, culture and customs. However, the role of this distinction was becoming increasingly weak due to the emergence of regional integrations (NAFTA, the EU and so on), the rapid development of transportation and telecommunications led by globalisation process and, last but not least, the force of integration and community creation by the elderly in foreign surroundings (Huber and O'Reilly, 2004).

in the media. However, the spread of this eastward-facing process was not encountered in Central and Eastern European countries (Poland, the Czech Republic, Slovakia and Hungary, hereafter CEE)² that lacked a Mediterranean sea coast. Is it possible that warm coastal areas are preferred by elderly international migrants and that the inland is outside the scope of interest of international retirement migrants in this part of Europe? Except for Croatia (Božić, 2001; Klempić and Podgorelec, 2002) that was integrated in “The European dimensions of retirement among older migrants in Europe” project in its later phase, there was no foreign language publication from the CEE till 2005. This paper is a start in filling this gap.

Two terms were most commonly used to describe this complex and multi-faceted phenomenon: the first is *international retirement migration* (hereafter IRM), and the second is *international elderly migration* (hereafter IEM).³ From the life course perspective the IRM is nothing other than a subtype of human migration in addition to the spatial mobility of children, students and active earners (Courgeau, 1985; Mulder, 1993; McHugh, 1990; Fokkema, 1996; Bures, 1997; Kok, 1997). This characterisation (conceptualisation) is based on separate stages (statuses) in life and changes between them.⁴ From the statistical and demographic point of view IEM was defined by ages attained. Somewhere between 60–65 is the defining interval when the third age starts.⁵ The borderline (interval) depended on several factors but it was close to the official retirement age in the affluent countries. The Hungarian case study concentrates on IEM with 60 years of age chosen as the exact dividing line between adult-aged and the elderly. The elderly population is defined as those 60 years of age and older. The choice of age 60 as the elderly cut-off is a subjective decision. It was caused, on the one hand, by the fact that retirement age in Hungary is undergoing a gradual process of change. The former official male (60 years) and female (55 years of age) retirement age will be steadily increasing up to 62 years of age for both genders by the end of this decade. On the other hand, the indi-

² The most recent start of international elderly migration was caused by the previous position of Hungary in the international migration system. This country was part of the Eastern European migration system that encompassed tourism, student and worker (including soldiers) exchanges, and the movement of key economic personnel within the COMECON and Warsaw Pact frameworks before 1989 (Lévai, 1994). The volume and intensity of flows between the former socialist countries were moderate, albeit mutual and quite diverse (Iglicka, 2002: 156). Hundreds of thousands of Hungarians left the country directly across the Iron Curtain or indirectly on tourist passports. As a result two processes – return migration and family reunification – have started since the transformation of the political regime.

³ The author is aware that the term elderly has a broader scope than the notion retired. *International retirement migration* is considered as the consequent phenomenon of international package tourism. The indirect aim of the preferred term (IEM) is not to narrow the scope of research driven by a well-founded phenomenon. We have tried to retain our own open-mindedness during the research.

⁴ Student migration and retirement migration form part of the main focus of King’s (2002) proposal on the relatively new types of migration. However, child migration linked to the life-cycle approach, such as the two forms mentioned above, has been given scarce attention in recent literature (Jallade, Gordon and Lebeau, 1997; Dobson and Stillwell, 2000; Langerné, 2002; Baláz and Williams, 2003; Conway and Houtenville, 2003). In any case, why should child migration (Szabó, 2002) be excluded from the new typology since it is an emerging new form of migration? This means a formidably thematic challenge for the research ahead.

⁵ According to the recent United Nations’ classification, 65 is the beginning of the old age group in developed countries.

vidual retirement age is becoming more flexible in Hungarian society. It is not hard to predict that this construction will, in practice, fuel popular early retirement.

The data for this paper were prepared at the Demographic Research Institute. The original files on long-term international migrants and new citizens came from the legal registers of the Ministry of the Interior. The definition of long-term migration has been harmonised with the recommendations of the United Nations accepted by the European Union. This means that the database of international migration contains information only on those foreign citizens who stay in Hungary more than one year. Acquiring Hungarian citizenship is based on the *ius sanguinis* principle and multiple citizenship is possible. This type of data has inevitable limitations. Registers have been created not for statistical but rather for administrative purposes and contain information reflecting this interest. Research-relevant characteristics are as follows: gender, age, origin and destination. There is no information on family background, educational qualifications or economic activity. Moreover, the short-term immigrants who stay in Hungary less than one year are outside of the scope of these statistics. One of the advantages of this sort of statistics is the low level of under-registration. Rodríguez, Egea and Nieto (2002) found in their study that the main cause of the poor data quality in the legal register derived from the fact that under-registration was an outcome of the administrative process method. Namely, a large number of people did not complete the arrival and departure forms because the registration was voluntary in Spain. In Hungary, a large number of economic, social and health benefits are granted parallel to the immigrant and citizen status so that, in practice, it is in the individual's interest to register quickly and officially. In addition, the act of registration is compulsory for immigrants. These are forensic facts that this does occur. According to the balance of advantages and disadvantages that this source may afford, we could state that the data reflect the international migration flows, stocks and gaining citizenship related to Hungary in a reliable way from the quantitative aspects.⁶

Comparative methods were used where standardised migration and citizenship time series were analysed. Except for the country of origin statistics, we worked on shares and rates. Using this solution, we could avoid the distortion effect of the changes in absolute numbers and could concentrate on processes. In some cases we will give information on basic absolute numbers in brackets in order to facilitate understanding of the text.

The paper is organised as follows. Firstly, it deals with the flows of IEM and then turns to the acquiring of Hungarian citizenship as the main factor of the status change

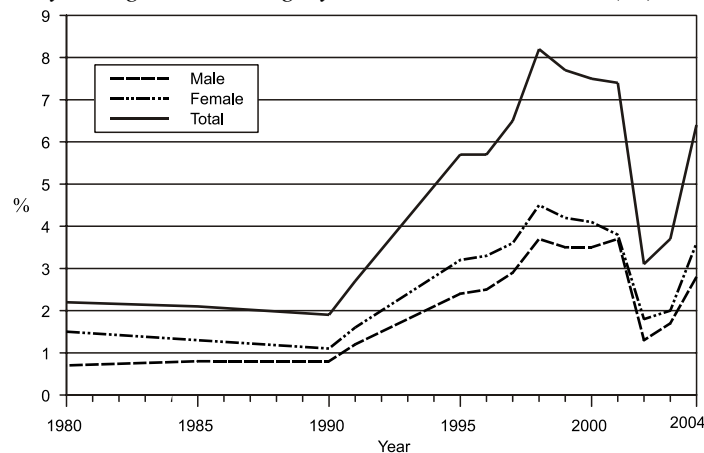
⁶ A totally different situation can be found when we compare the Hungarian data quality with the register-based statistical information on Northern European retirement migration to the Southern European Sunbelt. The common demographic data sources provide no information about the flow and stock of international elderly migration in Southern European countries studied. However, significant effort was made to explore retirement migration oriented towards the South. The set of primary research provided information on both the individual socio-demographic characteristics of migrants, and also the causes and consequences, but without a precise sample frame (Casado-Díaz, Kaiser and Warnes, 2004). The common weakest point of these researches was the lack of representative character. Registers in Hungary give a unique opportunity for the creation of the methodologically correct sample frame. Unfortunately, broad-scale systematic empirical research has not been conducted in Hungary. In general, the social survey is the principal instrument of social science to gain information, for instance, on migratory history, the destination selection process, the migratory unit, multiplicity of residence, home-ownership, citizenship, language knowledge, willingness to integrate and ambitions in the local public sphere (King, Warnes and Williams, 2000; O'Reilly, 2000; King, 2002; Huber and O'Reilly, 2004).

of immigrants in Hungary. Next, as a result of spatial, demographic and legal processes, we presented the stock of IEM with special attention to the eleven important sending countries. This section of the article examines some less well-known contradictions in the Hungarian pension system based on international agreements. The paper ends with a conclusion and discussion section.

Later life international migration flow

By analysing the numbers and rates of foreigners migrating into and out of Hungary we draw particular attention to the new tendencies (Williams et al., 2000; King, 2002) observable in the waves of migration affecting Hungary and try to identify certain characteristics and patterns. Before 1988, international migration related to Hungary was very limited. Annual emigration fluctuated between 3–4 thousand people after the 1956 Revolution. Meanwhile, the yearly immigration ranged between 1–2 thousand in the same time period. The international migration balance was significantly negative and its long-term multiplicative effect on Hungarian population loss was even higher, due to the young age structure of the net international migrants (Illés and Hablicsek, 1996). A new epoch started after the fall of the Berlin Wall. The former sending country became a receiving and transit country. Between 1988 and 1992, 20–40 thousand people immigrated and 5–15 thousand emigrants moved away annually. From 1993 until 1997, the international migration flows decreased by an average of 15 thousand immigrants and 3 thousand emigrants in each year. A relatively new period started in 1998 when, in close relation with the accession procedure to the European Community, Hungary became popular as a destination among some neighbouring countries' citizens. The number of citizens of the European Union increased (Illés, 2004) parallelly with this process. They were registered as immigrants, too. The continuation of old waves together with the developing ones results in an annual average of 20 thousand immigrants and 2 thousand emigrants and the migration balance has been increasing slowly from 1998 until the present.

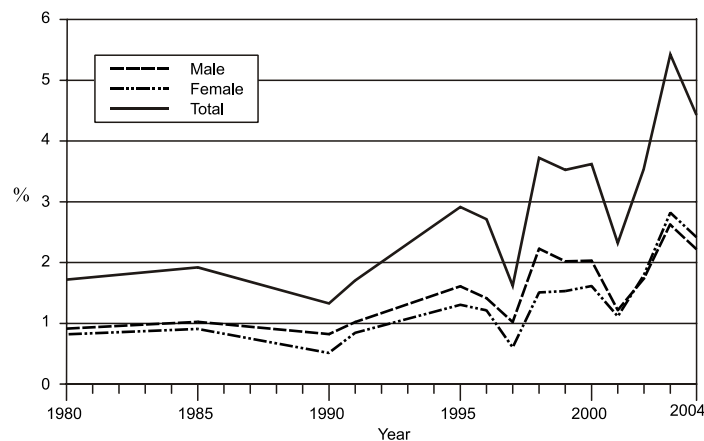
Figure 1: Elderly immigrants to Hungary between 1980 and 2004 (%)



Source: Hungarian Central Statistical Office; author calculations

The small number of immigrants in the 1980's included a very small share of elderly people, only 2%. Nor did the share of the elderly rise above 3% in the large waves of immigration in the late 1980's and early 1990's. The relative breakthrough took place from the mid 1990's onwards, when the participation of old people reached and even exceeded 6% within the total migration inflow. The peak was reached in 1998, after which their proportion stabilised at just over 7%. Thus, we are able to point out that an increasing share of immigrants during the 1990's were over 60. A new restrictive immigration law came into force in 2002 and its direct effect was a sharp decline in later-life immigrants. This means a more than 4 percentage points diminishment in the proportion. The short-term temporal effect was caused, on the one hand, by the general character of the immigration law harmonised fully with the rigorous Maastricht criteria of external EU borders and the rules on the stay of foreign citizens in Hungary, while, on the other, a significant change took place in the domestic administrative system. The decentralization process began that meant that, besides the one immigration office in the capital, Budapest, seven regional centres were created. Every start is hard so many official decisions on immigration queries were postponed for practical reasons until the following year (Tóth, 2004). In the last two years, the share has revived and reached the Millennium level. We can conclude that the fall of the indicator is explained by outer effects rather than by the change in the trend of the process. Figure 1 gives an insight into the gender differences. Not surprisingly, the female rate was higher during the investigated period. This fact is connected with the elderly gender ratio in the sending countries and higher female life expectancy. However, this does not mean that the female probability of international migration was higher than its male counterpart.

Figure 2: Elderly emigrants from Hungary between 1980 and 2004 (%)



Source: Hungarian Central Statistical Office; author calculations

The emigrational trend is similar to the immigration one, but the general level is lower and more fluctuations can be seen. Elderly emigration had been very low (below 2%), similarly to immigration, under the State socialist regime. There was no upsurge

at the start of the transformation period, when migratory upheavals were registered by all the CEE countries (Laczko, Stacher and Klekowski von Koppenfels, 2002; Bonifazi, 2003). In contrast, a slight decline was measured in Hungary. The mid 1990's was the time when the growth tendency started. The trend was interrupted by the temporal effect of the Yugoslavian civil war. Subsequently, the trend revived and it reached its first local maximum in 1998, and then the level stabilised around 3.5%. This was approximately half of that of immigration during the same time interval. The falling share reflected the huge media coverage before the new Immigration Act. The sharp increase after that was caused by the spirit of law mentioned above and by the effect of postponement of former emigration decisions. Gender differentials showed an opposite pattern in comparison to the immigrants. The male rates were higher till 2000 while the female rates became dominant after that. The twenty-year long male surplus could be explained by ageing of guest workers in Hungary. They had had immigrant status and when they reached retirement age, or later, they returned to their home countries. This type of return migration with a slight male surplus was the most recent indication of the previous work-related Eastern European migration subsystem (Iglicka, 2001). Whereas the patterns of return migration from Hungary were similar to the return migration from North Western Europe to the Mediterranean region (Rodríguez, Egea and Nieto, 2002), their volume was significantly smaller. From 2000 onwards retirement-related emigration balanced the previous form, and there is a great probability that it will overtake it in the near future. We can draw the conclusion that the immigration side of IEM in relative terms is stronger than the emigration one. Moreover, we must emphasise that the absolute number of elderly immigrants was several times higher than the counterpart each year, for instance, ten times higher from 1998 onwards. So the net IEM was extremely positive in relative as well as in absolute terms.

The acceleration of IEM, which began in the mid 1990's, deserves particular attention because the elderly took an increasing part within an already growing and reviving wave of immigration. In the six years after 1998, a total of more than 7 thousand old-age foreign citizens came to live in Hungary as immigrants. During the same period of time less than 4 hundred elderly persons with immigrant status emigrated from the country, so the balance of the period was overwhelmingly positive in terms of IEM. Thus, we can point out that the majority of later-life immigrants settled in Hungary and were not prone to emigrate from the country. In attempting to explain this phenomenon it seems highly likely that the young and middle-aged persons, who had arrived with the immigration flux of the late 1980's and early 1990's, eventually brought their parents along, too (Gödri and Tóth, 2005). In other words, the parents decided that they would follow their children and relatives who had moved to Hungary. Essentially this process was a practical movement toward family re-unification (Rédei, 2005). Its unique distinguishing feature was that the compact nuclear family had immigrated to a great extent (Gödri and Tóth, 2005) and that the elderly relatives followed suit later. The motivations may have included the fact that if the elderly parents came to live in Hungary they would be easier to look after, if need be, than if there was a distance of several hundred kilometres between them and their children (Grundy and Shelton, 2001). If the immigrating parents were ill, they could expect a higher standard of health service than at the

place they had left behind. And if they were healthy they could connect with the formal or informal labour market, assist as grandparents, do housework, provide emotional support and could give the money from selling their property in the country of origin⁷ to the younger generation as a sign of inter-generational solidarity, alongside offering use of their activity itself. Obviously, parents following their children are not the only pattern for old age immigration – there must be others but this is likely to have been a significant factor.

Another significant section of IEM consists of persons who had once emigrated from Hungary and wished to return to their roots. After the cataclysm of World War II (deportations, refugee flows, soldier movements), hundreds of thousands of people emigrated from Hungary based on the bilateral Slovakian-Hungarian agreement on population exchange and the expulsion of ethnic Germans who had collaborated with the Nazi regime. Exactly 198 thousand Hungarians emigrated to the West after the 1956 Revolution (Dövényi and Vukovich, 1994). After that, as mentioned in the section above, 3–4 thousand emigrants was the average yearly number. Apart from the emigration flow to the New Worlds (the Americas) after World War II, a significant number of emigrant populations with Hungarian backgrounds developed in the western countries. Hungarians did not move to West as guest workers because of political isolation (Hárs, 2002). There was no chance to join the mass guest-worker movements in a legal way. This is a distinguishing feature of Hungarian emigration compared with that of the former Yugoslavia and the Mediterranean countries. For instance, a young Spanish population has emigrated to North Western European countries from the third quarter of the 20th century. Recently that movement, which began slowing down at the time of first oil crises, has been replaced by a counter-flow, namely return migration. The return of the Spanish workforce abroad and their descendents is not necessarily related to age. Rodríguez, Egea and Nieto (2002) stated that the pattern was more complex. International borders opened at the end of 1980's and the isolation disappeared, but the former Hungarian emigrants aged in receiving countries and, conversely to the Spanish situation, the return migration to Hungary was dominated by old people who had voted with their feet in the former era.

The third significant layer of IEM is that of foreigners with no direct Hungarian background who are seeking for a more pleasant side of life there (Berényi, Illés and Michalkó, 2003). A part of this group could be the mature children of the first and second generation of Hungarian migrants all over the World but they could also be the new type of international migrants, namely, amenity-seeking retired migrants closely connected with tourist flows (King, Warnes and Williams, 2000; Rodríguez, Fernández-Mayoralas and Rojo, 1998; Williams et al., 2000; Hall and Williams, 2002; Casado-Díaz, Kaiser and Warnes, 2004). The former tourist view is the first key momentum to prove the existence of the third group of IEM (King, Warnes and Williams, 1998). The second momentum is embedded in the most recent economic history of Hungary. The medium-term effects

⁷ In the special case of elderly immigrants possessing significant financial means, it is not necessary to sell their property in their country of origin. Both the elderly person and their relatives would be in a position to circulate between the two countries on a seasonal basis by maintaining those assets.

of the first oil crises caused a huge imbalance of the country's international financial position. One of the solutions to avoid a fiscal crisis was to grant permission for and encourage international tourism to Hungary. The international mass tourism flows started one and a half decades before the metamorphosis of the former regime (Michalkó, 2001) and the international tourism inflow was long independent from international immigration (Szivás, 2005). This caused the common picture of Hungary in the western world: one of the happiest barracks within the socialist camp.⁸ However, we were not alone in harbouring this false belief at that time. Bulgarians also thought that their country was the most prominent foreign tourism receiving country within the Eastern block (Ivy and Copp, 1999: 428). In reality, tourism developed along a very different path in the CEE countries than in their Western counterparts. The planning and management of tourism, as a part of the third economic sector, was given low priority throughout the region. Due to the poor infrastructure, the level of visitors and tourist receipts lagged far behind compared with Western European countries. In Hungary, the State-controlled national agency (IBUSZ) channelled and directed the few tourists from beyond the Berlin Wall to higher priced accommodation facilities in Budapest and to the country's second main attraction, Lake Balaton. Mid 1970's tourism was planned with the goal of generating foreign hard currencies (Compton, 1991). The number of Western tourists to Hungary climbed significantly during the 1980's from 1.2 million in 1980 to 2.2 million in 1988, due largely to easy entry and the extensive State propaganda campaign (Böröcz, 1996). The number of Western international visitors to Hungary has grown sharply in the post-socialist period but their share within total visitors has been declining to the advantage of the citizens of former socialist countries. Until 1996, the number of Western tourists ranged from 8 to 10 million (including those from neighbouring Austria). Sub-

⁸ In the context of return migration and amenity-seeking retired migration, the question arises whether these processes began on a large scale at the time of the change of the regime. Three factors could explain the postponement of the return and retired migration in an appropriate way: the new wave of mass tourism, a socio-psychological phenomenon, and the fluid legal rules of real estate ownership by foreigners. Firstly, the ten million scale mass yearly international tourist flow has been emerging since 1988, which means a rival factor to international migration. In other words, tourism substitutes and/or complements migration. Secondly, the sense of uncertainty was the main socio-psychological factor raising the barrier to international migration. Media broadcasted the general direction of transformation, from socialism to capitalism, from the State-planned economy to a market economy, and from State socialism to democracy, but nobody knew what this meant in particular in everyday life. That was an unanswerable question at the microlevel. At that time, the forms of internal mobility in Hungary were also at a very low level. The volume of internal migration, residential mobility and commuting declined sharply. For instance, the total internal migration rate had never been so low. It reached its lowest level of 3.5 in 1994. This meant that the average person would migrate 3–4 times within Hungary during the course of his/her lifetime if long-term age-specific migration rates persisted. After that, the level of internal migration began slowly growing, hand in hand with residential mobility and commuting (Illés, 2004). For instance, the total internal migration rate rose to 4.5 in 2004. Thirdly, international retirement migration is closely related to second home ownership (Müller, 2002; Hall and Müller, 2004; Williams, King and Warnes, 2004). Till 1974, foreign real estate ownership was prohibited in Hungary. Gaining foreign currency convertibility was the driving force of the first step in liberalisation to a small extent. During the first phase of transformation, other liberalisation measures were introduced by a Government decree in 1991, but a host of restrictions and time-consuming bureaucratic measures remained. This fluid legal situation was not to the liking of foreign citizens. Broad liberalisation took place in 1996 and this measure induced growing foreign interest in the Hungarian real estate market (Berényi, Illés and Michalkó, 2003).

sequently, the average yearly number diminished to 6.5 million (Michalkó, 2003). According to the data presented, we could conclude that the role of large-scale international tourism as a recruiting post for retirement migration from the West (Rodríguez, 2001) has been functioning since the mid 1970's.

The number of old people classified as immigrants to Hungary is reduced significantly by their becoming Hungarian citizens, as well as by emigration or death. The demand for Hungarian citizenship increased sharply around the end of the State socialist period, partly because of the demand of immigrants and partly because of returning Hungarian emigrants, who had lost their citizenship under the former political regime.

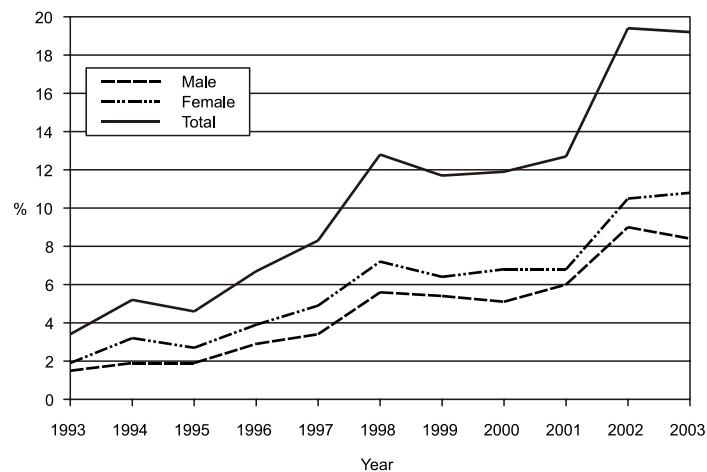
New citizens in their later life

Prior to the 1990's, there were few foreign citizens who applied for naturalisation. The majority of applicants and those who eventually received citizenship were ethnic Hungarians who had left the country earlier. These former emigrants re-settled in Hungary after they had been retired abroad. Their numbers did not exceed a few hundred until the 1990's. There was a quantitative change from 1993 onwards. Until the end of 1997, approximately 10 thousand persons were being naturalised as Hungarians every year, which meant a low rate (1 per thousand) when compared to the total number of inhabitants in the country. After 1998, the number of new Hungarian citizens dropped and the three-year average was 7 thousand new citizens. The next leap in their number came about in 2001, to be followed by unprecedented growth, with an average of more than 10 thousand people annually. Alongside the fluctuation in the absolute figures, the growth in the rate of old people became a practically unbroken process, starting in 1993. Parallely with the drop in their total numbers, a qualitative change could be observed in 1998, after which the rate of persons who became Hungarian citizens in old age became stabilised around 12%. Data for 2002 and 2003 presage the possibility of another qualitative change. As the shares are just under 20%, we can say that one in five new Hungarian citizens was over 60 years of age in the years in question. Such a high level had never occurred in Hungarian citizenship statistics. Gender differentials had not changed since 1993. More elderly females became Hungarian citizens than males. The rates during the last two years may predict the growth of the female surplus. Looking at the above figures, we must emphatically refute the stereotype concerning the composition of the new citizens, which is extremely widespread in the thinking of the general public and according to which new Hungarian citizens are only able-bodied young men of the active age group.

It appears that there was no concrete factor positively discriminating in favour of elderly persons to the disadvantage of youngsters and acting in the direction of increasing their proportion. Their share, however, is high enough to warrant the consideration of the decision-makers on Hungarian immigration policies. Ackers and Dwyer (2004: 472) pointed out that the international elderly migrants' willingness to manage their rights and to manipulate advantages across geographical and social space raised serious challenges at the European and domestic level. Acquiring citizenship nowadays is not only a symbolic act, when the mother State helps its former citizens, but this status also provides lots of advantages and obligations. When persons gain Hungarian citizenship, they become citizens of the European Union at the same time. They have the right to

move and reside freely in the EU, the right to vote and to be a candidate in both municipal and European level elections, the right to claim diplomatic protection under the authority of another member state and the right to petition to the European Parliament (Gellérné, 2004). Moreover, they hold all of the domestic, civil, social and political rights. According to EU regulations, the economically inactive persons' right to reside in another member state is limited by two important conditions. They must be covered by health insurance and have sufficient resources to avoid becoming a burden on the social welfare system of the host member state. The two foregoing basic restrictions are outside the scope of Hungarian citizenship regulations. This is a simple example of the general phenomenon described by Warnes (2002: 148) on the emerging conflicts between national and European sovereignty. The possibility of being a legal elderly buffer zone⁹ in the near future is a realistic scenario for Hungary. Nevertheless, citizenship in later life may lead to unexpected needs or demands for care, either from relatives or from the country to which new citizens belong (Blakemore, 1999). This could mean both an extra burden for the State budget, but also the inevitable emergence of a collective discriminatory attitude, in general, to the multifaceted mass of elderly foreigners. We do not suggest a general restriction due to its ineffective character (Fonseca, Caldeira and Esteves, 2002; Warnes et al., 2004). We argue for clear, rigorous and more sophisticated domestic regulations on citizenship in order to avoid the power of xenophobia in the host society.

Figure 3: Persons who acquired Hungarian citizenship in later life between 1993 and 2003 (%)



Source: Hungarian Central Statistical Office; author calculations

New elderly Hungarian citizens are largely recruited from three groups: former emigrants who retired abroad; ethnic Hungarians who had lived in neighbouring coun-

⁹ The unexpected liberalisation of the international border crossing caused a similar effect in CEE, in respect of illegal migration.

tries (Kocsis, 2001, 2004) and retired abroad or in Hungary; and, thirdly, elderly foreign immigrants with or without Hungarian relatives, who intended to become citizens (Tóth, 2004). The borders between these groups are fluid and they often overlap but a common feature is that all of them are actively expanding (managing) their economic, social and political rights (Ackers and Dwyer, 2002).

The number and rate of elderly foreign immigrant stock in Hungary depends on the factors discussed in detail above, i.e. the immigration and emigration figures and the changes of status, of which gaining citizenship is the most important. It also depends on the natural demographic processes among immigrants in Hungary, in other words, ageing and the total number of deaths among immigrants.¹⁰

IEM stock

The share of old persons among total immigrants in Hungary rose to over 6% by the middle of the 1990's. After continued growth, it reached 10% around and during the three years after the Millennium (which was only 6.6 per thousand within the total elderly inhabitant population). Thus, one in ten foreign citizens of immigrant status in Hungary is 60 years of age or older.¹¹ In 2003–2004 the proportion of elderly immigrants rose sharply again. This meant that in the last investigated year one in eight immigrants were elderly people. Not surprisingly, the elderly stock, however, has always been characterised by female dominance for ten years.¹²

The data in Figure 4 reveal quite clearly that the ever growing number and share of elderly immigrants in Hungary is not caused only by the natural aging of the immigrant population but, as a second factor, by the waves of immigrants being increasingly older in age composition. The average age is one of the synthetic indicators of the ageing process. According to the Hungarian stock data, the average age of immigrants was 28 years in 1990. By the middle of that decade it rose to 33 years and stabilised around this figure. Another significant increase was measured after 2000 when the average age of immigrants became more than 35. The intensity of the rise in the average age of immigrants was far higher throughout the whole of the period under examination than the ageing measured in any of the sending countries. This means that the ageing of the populations in the

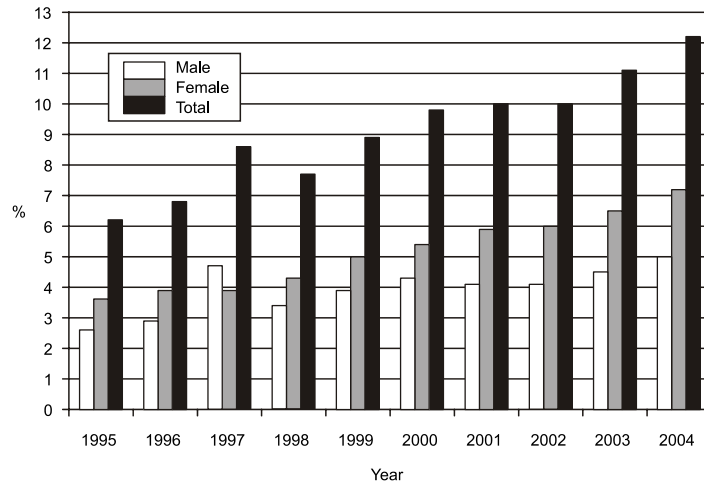
¹⁰ The number of births among women of immigrant status does not directly affect the absolute numbers of elderly migrants, but may do so in sixty years time. However, the number of births can modify the shares and rates of the elderly immigrant population in relative terms.

¹¹ Despite a significant gain due to the growing trend of international migration flow, the number of total stock was reduced by 40 thousand immigrants from the year 2000 to the next. There is one more factor, which can influence the number of immigrants. This is a factor which arises from the pertaining legal regulations or, in other words, from the changes in the relevant administrative practices (of the immigration authorities), as long as statistics do not take into consideration their own natural mechanisms and accept the effect of administrative change, instead of exercising a critical and corrective attitude toward their sources. This is another reason for using relative perspective in this article in order to explore the real patterns of the phenomenon without the administrative effect.

¹² We must note that two thirds of the female surplus within the total stock of immigrants in Hungary is caused by the general female predominance characteristic in old age, which is clear evidence of a general tendency toward feminisation in international migration related to Hungary.

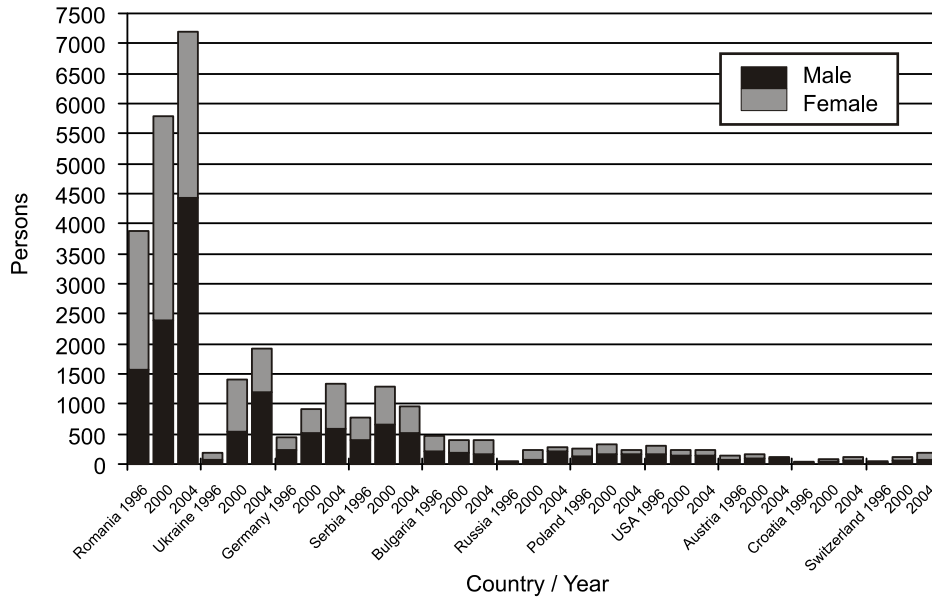
countries of origin cannot, on its own, provide a satisfactory explanation of the phenomenon. We may suppose that there are many special factors underlying the dynamism of IEM, which select positively the international elderly migrants in great extent.

Figure 4: Stock of elderly immigrants staying in Hungary (1995–2004) (%)



Source: Hungarian Central Statistical Office; author calculations

Figure 5: The number of immigrants over 60 by the 11 important sending countries (1996–2004)



Source: Hungarian Central Statistical Office; author calculations

Let us start the analysis of the spatial distribution of the eleven major sending countries, which represent more than 90% of the total stock, and put special emphasis on dynamics. On the basis of Figure 5, it is easy to ascertain that most immigrants over the age of 60 came to Hungary from Romania (3,858 people at the beginning of 1996, 5,783 persons in early 2000 and 7,206 in 2004). After continuing to rise, the share of this dominant component reached 41.9% of the total elderly stock and subsequently dropped to 39.4% by 2000. (The decrease in proportions is due to the faster growth rate of other countries analysed below.) After the Millennium, Romania was followed by the Ukraine (193 persons at the beginning of 1996, 1,499 persons in early 2000 and 1,920 persons in early 2004). The dynamics of the Ukrainian change was noteworthy as a period of barely eight years saw almost tenfold growth. This showed a significantly faster growth in comparison with the Romanian (twofold growth for the whole period). In the mid 1990's, there were more German, Serbian, Bulgarian, Polish and American elderly immigrants in Hungary than Ukrainians. Germany, third in the list by quantity at the last date, also registered growth until 2004. The number of elderly Germans grew threefold in eight years. The fourth place in absolute numbers was taken by elderly immigrants from Serbia, but the number has been decreasing since the Millennium. The situation of Bulgarian citizens, presently in fifth place, is special in that, contrary to the overall trend, their numbers have dropped slowly since 1996. Russian immigrants, presently in sixth place, are also showing significant growth (their growth rate is between that of Germans and Ukrainians with an almost fivefold dynamic). Polish immigrants, now in seventh place, were also higher in numbers till 2000, but the volume has been diminishing sharply resulting in a smaller total than in the initial year. At first glance, it is curious that more elderly immigrants living in Hungary came from the distant USA than from the neighbouring Austria and Croatia, which both had common history with Hungary till World War I. Last but not least, the fourfold dynamics of Swiss citizens generated particular attention. At the end of the period studied, more Swiss than Croatians resided in Hungary, equal in number to Austrians, but lower in number than US citizens. In addition to the leading 11 countries, we should mention that the number of immigrants from neighbouring Slovakia, a country with a significant ethnic Hungarian population, shows a remarkably low number of immigrants. Less than half a hundred elderly immigrants resided in Hungary, similarly to those from Slovenia, with a small ethnic Hungarian community.

One motivation of IEM

Based on the author's survey in the Upper Balaton region (Illés, 2005), we compress the core elements of the motivations. We can distinguish seven different groups that apply in the Hungarian context: family oriented, work-related, return, amenity-seeking, crises-led, ethnic-related and pension-hunting. The last group seems unusual at first sight. Is there something that denotes a peculiarly Hungarian, CEE or inland type? According to Figure 5, three Eastern European countries had fast growing dynamics between 1996 and 2004. The elderly citizens of Romania had around a 1.87 growth rate, the citizens of Russia had approximately a 5.25 growth rate and the citizens of Ukraine had about a 9.65 growth rate during the investigated period. The greatest number of retired immigrants came from

Romania and the Ukraine. These are the two countries plus Russia (or their predecessors) with which Hungary has had a valid and functioning bilateral social political agreement, constructed on a *territorial principle*, ever since the early 1960's (Lukács, 2000). These agreements are applicable to natural persons if their permanent place of residence is in the territory of one of the countries involved in the agreement. The amount of pension is calculated by the social insurance organisation of the country where the beneficiary's permanent address is, on the basis of the years of service performed in both countries added together. There is no share-burdening, one country pays and the other does not. The pension organisation applies the valid internal regulations of its own country. These agreements were based on the supposition that the international migration that would occur between the two countries would be low-level and roughly on the same scale. The two countries would offer services of more or less the same standard and thus the burdens of the parties to the agreement would balance out. This supposition was not proven true even at the time when the agreement was signed, and after the metamorphosis the balance continued to shift more radically to the financial disadvantage of Hungary.

The *pension-hunting type* is a peculiar Hungarian form of IEM constructed by a particular context. We postulate the great probability that the pension-hunting type has a temporary character because this is an outcome of the transformation. It can be stated with a great deal of probability that some pensioners arriving from Romania, the Ukraine and Russia made a rational individual decision based on a sound recognition of self-interest when immigrating to Hungary, since the Hungarian regulations grant them a far higher pension than they would have or could have obtained in their country of origin.¹³ The number of Ukrainian and Russian people resident in this country has grown five to ten times since 1996. In other words, a higher pension was probably significant as a motivating factor. In the year 2004 7,206 international elderly immigrants from Romania, 1,920 later life immigrants from the Ukraine and 278 elderly people with immigrant status from distant Russia settled in Hungary. We can state with considerable certainty that the pension-hunting type of IEM (PHIEM) is a hitherto unseen phenomenon in a particular space and time. In order to explain this phenomenon and embed it in a reliable conceptual framework we must concentrate on countries in transformation, restricting the time interval to the metamorphosis of the social welfare state. We may explore connotations for research on petty traders (Sik and Wallace, 1999; Igljicka, 2001; Williams and Baláz, 2005; Nyíri, 2005), household survival strategies (Smith, 2002) and forming transnational social spaces (Faist, 2000; Nell, 2004). The analogues provide useful tools for explanation, but they are not completely adequate for understanding the scale, changes, timing and spatial pattern of PHIEM. It may be perceived as a particular form of arbitrage (Altvater, 1998) whereby surplus value is realised through past differences in general wage levels between two countries, and more intensive everyday family interactions in the future. The general situation was created by the re-

¹³ The pension-hunter international elderly migrant is featured by emigrant relatives. The action of former emigration stretched the family network that is the prepositional factor of moving. The elderly possess human capital resources (in addition to working capital), the ability of mobility as capital (Kaufman, Max Bergman and Joye, 2004) and documented active life records as a special resource. The latter could be transferred capital directly by applying for a Hungarian pension.

constitution of national borders during the transformation, just as in the case of petty trading, but the former documented working life deriving from the sending countries, as a form of capital, is one of the main distinguishing features of PHIEM. By analogy, we can say that later life-immigrants in countries such as the Ukraine are trading on the basis of price differences (actually income differences) that they can access on either side of the border. The phenomenon of PHIEM can also be understood in terms of household survival strategies (Smith, 2002) or welfare-enhancing strategies in transnational social spaces (Faist, 2000) on both the parental and child sides (that is, the migration of the elderly relatives to join their children increased the total resources available to the household). However, the phenomenon is not simply a form of intergenerational transfer. From the broader historical perspective, PHIEM is the late effect of the “socialist brotherhood”, born in the context of cold war geopolitics. The general aim was to restrict human mobility and to glue citizens to their residences. For instance, the territorial principle of social political agreements was the enemy of circulation. The principle was constructed in exceptional cases under former regimes and it transformed into a mass practise in the highly mobile new era. PHIEM is the product of the transformation period in Hungary. The life cycle of this asset depends on the timing of the relevant market segment saturation and the lacunae closing practice of the international migration policy in receiving countries. Moreover, we can anticipate with great probability that the PHIEM has overriding temporary character, similarly to petty trading.¹⁴

In contrast, there were less than 50 immigrants of retirement age from neighbouring Slovakia living in Hungary, Slovakia having a significant ethnic Hungarian population. It is true that Hungary has social political agreements with one-time Czechoslovakia and the successor states of Yugoslavia, as well as with Bulgaria and Poland, which work not on a territorial principle but on the principle of *share-burdening* (contribution in proportion to time). This means that demand for old age pensions is evaluated by both countries according to their own internal regulations by the authorities of both countries. The social insurance organisations determine the proportionate part of the pension thus calculated according to the years of service performed in the territory of their country and pay the beneficiary sum. Thus, the years of service spent in both countries are added together and both countries pay their share of the old age pension to the beneficiary. It is not worth immigrating to Hungary from Serbia, Bulgaria, Poland, Croatia and Slovakia for this reason alone, as the resulting old age pension would be the same in Hungary. In that case, if the immigrants behave as *homo economicus*, a further factor hindering migration is that the price level of basic commodities is much higher in Hungary than in Bulgaria and Slovakia, and is similar to such prices in Poland. The average price level was lower in Hungary than in Serbia and Croatia, but the effects of the Yugoslav war were superimposed (Kulu, 2004) on the economic and other factors.

Conclusion and discussion

The international migrant subpopulations consist mainly of younger age groups, but migration still has a type, which is analysed less than the others – that of elderly

¹⁴ A further possible reason for the immigration of elderly persons may have been that they enjoy a higher standard of social and health care in a semi-affluent country, Hungary, than in the countries of origin.

migration. While the aging process has accelerated in the population of Hungary (Józan and Katona, 2003), the share of elderly people among immigrant stock has also been rising. At the present time, the proportion of IEM exceeds 12% within total immigration stock, which means that one in eight immigrants in Hungary is 60 years of age, or older. In rough outlines, the increasing proportion of elderly persons among immigrants can be traced to two demographic factors. One is the natural aging of people with immigrant status themselves (ageing in place). The other comes from the effect of mortality related closely to the health condition of the elderly.¹⁵ Thirdly, the combined spatial effect is reflected in the net flow of IEM. The fourth factor is connected with the status change. The share of persons who became Hungarian citizens in old age has been increasing continuously from the mid 1990's, aside from minor fluctuations, and has stabilised near to 20% in the last two years. This proportion is much higher than the recent elderly share within the annual flows of immigrants and emigrants. However, the proportion of elderly people within the new Hungarian citizens group is near that of the share of elderly people within the Hungarian population, which is around 22%. We can anticipate that the rejuvenation effect of new citizens on the total population will be exhausted. The emerging processes reveal quite clearly that the high share of elderly persons among immigrants and particularly among new citizens is an issue which deserves attention. Further detailed and thorough examination of these research areas promises significant scholarly achievements. And as far as policy-makers are concerned, the tackling of the above-mentioned problems cannot be delayed any further.

Turning to the specific research questions formulated in the Introduction, the responses are as follows: the starting period of IEM related to Hungary was in the mid 1990's. It emerged half a decade after the international migration upheavals had taken place in Europe. The analysis of time series of flow and stock data proved the expansive character of this phenomenon. The quantitative level of IEM was modified directly by demographic (ageing and death), spatial (immigration, emigration) and legal (status change) processes. The main result of the paper is to explore a peculiar Hungarian type of IEM, namely the pension-hunting type. The situation of immigrants of the pension-hunting type, who have come to live in this country mainly for family reasons, seems far from satisfactory. Although their relocation probably entails capital transfers to the receiving country, without the protecting environment of their family or community they would not be viable in their new setting. Besides taking advantage of health and social services based on public funding (which is increasingly problematic), these people are also in need of transfers from their family network. It is highly likely that one of the worst problems of the pension, health and social security systems of the near future will be the necessity of surplus financing for the significant number of aged parents, who have come as immigrants to Hungary and have been retired.

This sort of migration has potentially high policy relevance. The core of the tension is the converse interest of the immigrant to that of the receiving State. On the one

¹⁵ Another demographic factor with an upward effect on the stock of IEM could be the extremely good state of health reflected by the low mortality rate of old age groups, which arises from the previous selectivity by health status. For lack of specific national research on this question, however, this can only be formulated as a hypothesis.

hand, there is the individually made rational and legal decision to apply for a Hungarian pension. That is a good bargain for the immigrants and new citizens at the expense of the domestic pension fund. On the other hand, the public actor, the Government, safeguards its own inhabitants' interests and is responsible for the country's budget (Warnes, 1999). But immigrants and new citizens are both part of the country's inhabitants. The immigrants have local and EU electoral rights, the new citizens have the same in addition to active and passive rights to be elected and participate in the national election. This reflects the complexity and sensitivity of this chicken-and-egg situation. We are certain that such a spontaneous process is not desirable in the long term and cannot be maintained in Hungary if the country wishes to launch an effective and selective international migration policy with a utility principle. Hungary probably profits more from return migrants who are re-settling in Hungary after living in emigration in the West and from the amenity-seeking elderly immigrants, both groups drawing pensions from abroad, which is required for a decent standard of living. We may state that a further increase in pension-hunter immigrants is in no way desirable within the present regulatory framework.¹⁶ If this phenomenon continues on a large scale, it will necessitate interference in the spontaneous processes.¹⁷

This paper has had an exploratory purpose. We are not sure that Hungary is the only magnet state of IEM in CEE. It should be emphasised that further studies are warranted, in order to confirm the emergence of elderly movements and to discuss the hypotheses on specific elderly migration types. We are aware that further empirical elaboration of this subject is needed. In Hungary, other sources of information will be gathered, for example, from other administrative institutions or sample surveys and from in-depth interviews with key informants, and these are likely to provide more information on the process of IEM. Moreover, knowledge on its structure, causes and consequences will be expanded.

¹⁶ This is not only undesirable in the present regulatory framework but also given the huge size of the ageing baby-boom cohorts born in 1953–1955, who will begin entering the pension system at the end of this decade. The preferences of this populous generation could have significant consequences for the sustainability of the state pension system.

¹⁷ We discussed above the conflicting interests of the State and the individual. We must mention that the interests of the national and local policy-makers are not the same (King, Warnes and Williams, 1998). Municipalities need inhabitants who purchase houses or flats, increase the tax revenues coming from the State budget, pay local taxes, consume local goods and services and often generate new jobs. The municipalities are indifferent to the sources of the pensions of their inhabitants. The existence of regular income more than the threshold of local social benefit is important for local leaders. The survey mentioned above was carried out on the North Bank of Lake Balaton, Hungary, at the end of 2003. Local authorities were asked about the immigrants living in their settlements. The most interesting findings were based on the response of mayors that municipalities have recently increased their efforts to attract international migrants, while they had previously preferred young families with children. However, the major conclusion in this paper from the survey of specific interest is that the time is coming when international elderly migrants will be called upon, on the one hand, to inhabit the empty detached houses in remote areas, and, on the other, to support the newly created private leisure parks and nursery home needs of inhabitants in Hungary (Illés, 2005).

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Sándor Illés

VANJSKE MIGRACIJE STARIJIH OSOBA U MAĐARSKOJ

SAŽETAK

Rad se bavi vanjskom migracijom starijih osoba u Mađarskoj. Taj sve važniji element migracije u Srednjoj i Istočnoj Europi slabo je istražen. Ovaj rad trebao bi pridonijeti da se ispuni ta praznina. Vanjska migracija starijih osoba istražuje se na temelju popisnih podataka o migracijskim tokovima, kontingentima i statistici o državljanstvu. Analiza se usredotočuje na vremenske nizove, ali se razmatra i povijesni kontekst kao i suvremeni obrasci te migracije. Cilj istraživanja bio je četverostruk. Prvo, nastojalo se otkriti kada je započela vanjska migracija starijih osoba u Mađarskoj. Drugo, ustanovljeno je da se taj fenomen sve više ubrzava. Treće, mogu se identificirati glavni makro-činioci koji utječu na te migracije, i četvrto, kao glavni rezultat istraživanja, uspjela se istražiti jedna mađarska specifičnost. »Traženje mirovine« predstavlja vrlo distinktivno obilježje migracije starijih osoba i na puno je načina nasljeđe socijalističkog razdoblja. Stoga je masovna pojava takve migracije posljedica razdoblja transformacije. Pretpostavlja se da lov za mirovinama ima privremeni karakter. O ključcima o motivacijskoj strukturi vanjske migracije starijih osoba raspravlja se s obzirom na implikacije u politici u svjetlu starosne populacijske strukture u Mađarskoj.

KLJUČNE RIJEČI: vanjske migracije starijih osoba, starenje, državljanstvo, mirovinski sustav, migracijska politika, Mađarska

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MIGRATIONS INTERNATIONALES DES PERSONNES ÂGÉES EN HONGRIE

RÉSUMÉ

Le présent article étudie la migration internationale des personnes âgées en Hongrie. La recherche sur cet élément de plus en plus important de la migration humaine en Europe centrale et orientale a fait l'objet de peu d'attention. Cette étude devrait contribuer à combler cette lacune. La migration internationale des personnes âgées est étudiée à partir des données des recensements sur les courants migratoires, les contingents et les statistiques de nationalité. L'analyse se focalise sur les séries temporelles, mais se penche également sur le contexte historique ainsi que sur les modèles contemporains de cette migration. L'objectif de cette recherche est quadruple. Premièrement, nous avons tenté de déterminer quand a commencé la migration internationale des personnes âgées en Hongrie. Deuxièmement, nous avons établi que ce phénomène est en constante accélération. Troisièmement, nous pouvons identifier les principaux macro-facteurs qui influent sur ces migrations, et quatrièmement, nous avons réussi à explorer une spécificité hongroise, ce qui constitue le principal résultat de cette recherche. La « chasse à la retraite » représente le caractère très distinctif de la migration internationale des personnes âgées et, sous bien des aspects, une conséquence de la période socialiste. Aussi le phénomène massif de la migration est-il une conséquence d'un période de transformation. Nous supposons que la chasse aux retraites est temporaire. Les conclusions sur la structure motivationnelle de la migration internationale des personnes âgées sont observées au regard des implications politiques à la lumière de la structure d'âge de la population en Hongrie.

MOTS CLÉS : migrations internationales des personnes âgées, vieillissement, nationalité, système de retraites, politique migratoire, Hongrie