

## Forms of Social Capital among European Retirement Migrants in the Valencian Community

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### ABSTRACT

This article analyzes social capital among European pensioners retired in Valencia. The objects of the study are associations and clubs for European retired migrants. We analyzed the self-advertisement of these associations and conducted 18 structured interviews with key informants. In addition, we also conducted a case study of an association whose objective is the improvement of the access to health services. We found a predominance of bonding capital: strong intra-group identity and lack of contact with the host society. We suggest that this transnational social space of retirees causes a fourth form of social capital, linking bonding capital, through the setting of vertical links to strengthen the group, based on the perception of a similar identity and trust in power and resource endowments.

*Keywords:* 1. retirement migration, 2. social capital, 3. transnationalism, 4. Valencian community, 5. Costa Blanca.

### Tipos de capital social entre los inmigrantes europeos retirados en la Comunidad Valenciana

#### RESUMEN

Este artículo analiza el capital social entre los pensionistas europeos retirados en la Comunidad Valenciana. El objeto de estudio lo constituyen las asociaciones y clubes. Se analizan los espacios publicitarios en los que se dan a conocer y se realizan 18 entrevistas semiestructuradas a informantes clave. Así mismo se lleva a cabo un estudio de caso sobre una asociación cuyo objetivo es mejorar el acceso a los servicios sanitarios. Se evidencia un predominio del capital de refortalecimiento del grupo: fuerte identidad intragrupo y falta de contacto con la sociedad de acogida. Se sugiere que este espacio social transnacional de jubilados provoca una cuarta forma de capital social –el establecimiento de vínculos verticales para reforzar el grupo– basada en la percepción de una identidad similar y la confianza en fuentes de poder y recursos.

*Palabras clave:* 1. migración de retiro, 2. capital social, 3. transnacionalismo, 4. Comunidad Valenciana, 5. Costa Blanca.

## *Introduction*

In the European Union (EU) and European Economic Area (EEA),<sup>1</sup> retirement migration has been documented as an element of “a new map of European migration” (King, 2002). European pensioners leave richer countries with relatively high living costs and unattractive climates for Southern European countries that have milder climates and lower living costs, although the gap in living costs is rapidly decreasing. Retirement migration has generated a wide range of transnational lifestyles in the local associations of mobile EU pensioners, a key factor in their welfare, well-being and identity-building processes (Casado-Díaz, Kaiser, and Warnes, 2004; Warnes *et al.*, 1999). Within the EU, retirement migration poses problems and creates challenges related to social participation, access to public services and healthcare (Huber, and O’Reilly, 2004). As a result of the unification of the EU and the growth of internal movements, questions have arisen over citizenship status (Ackers and Dwyer, 2004), social rights (Dwyer, and Papadimitriou, 2006) and particularly healthcare rights (Dwyer, 2001). Contrary to the case with working migrants, the social imaginary does not see retired European migrants, or those included in the broader concept of lifestyle migration (Benson and O’Reilly, 2009), as a socially deprived or politically controversial social group (Simó and Herzog, 2005).

Although research has described a tendency towards isolation in cities and residential areas (O’Reilly, 2000), many authors do not perceive this fact as problematic, either from a normative point of view or in regard to possible social consequences. Instead, researchers attest to the well-being and relatively high life-satisfaction of pensioners in their new living environment (Warnes *et*

<sup>1</sup> Foreign residents aged 50 years and more may be considered a proxy of retired migration. In the Valencian Community, more than 55 percent of the residents from Switzerland, Finland, Norway, Germany, Sweden, United Kingdom, the Netherlands, Belgium, Luxembourg, Denmark, Ireland and Austria are of that age (1<sup>st</sup> January 2011, Spanish Statistical Office, INE). Residents from Norway and Switzerland enjoy comparable supranational rights and privileges, and share important socio-economic conditions with EU citizens.

*al.*, 1999). However, for those who become ill and disabled, research has identified a lack of local healthcare provisions and family support as problematic (Huber, 2003). Isolation can become a severe problem with ageing, the death of a partner, or the increasing need for social and health services (Simó and Herzog, 2005). Furthermore, as Hurtado has pointed out, the family framework that characterizes the Spanish welfare system contrasts with the care expectations of retirees and their vital aspirations of autonomy (Hurtado, 2010:295). Moreover, loneliness can be deeper than in the country of origin as retirees age in residential areas far from town and feelings of isolation increase for those who cannot take part in outdoor activities (Huber and O'Reilly, 2004). Return migration following the death of a partner, severe health needs or financial difficulties is not uncommon (Casado-Díaz, Kaiser, and Warnes, 2004:373). In contrast to the "volitional and developmental" character of the original migration, the return is "forced and defensive" (Casado-Díaz, Kaiser, and Warnes, 2004:373-374). Regarding the social capital characteristics of retired immigrants, previous studies point to the specific class structure among British lifestyle migrants in Spain and the extent to which class judgments are reproduced to militate against others (Oliver and O'Reilly, 2010), and the importance of the mobility-enclosure dialectic inherent in these transnational groups (O'Reilly, 2007). Moreover, although the right to free movement is equal for all EU27 citizens, labor and retired immigrants differ in some respects including their associations (Simó and Torres, 2010).

The aim of this study is to gain a better understanding of social capital among EU pensioners. Evidence from other studies has shown the centrality of associations in the transnational lifestyles of mobile EU pensioners (Gustafson, 2008; Huber and O'Reilly, 2004; Casado-Díaz, Kaiser, and Warnes, 2004; Warnes *et al.*, 1999). We assume that these organizations will be crucial for the creation of various forms of social capital. To give an indication of associational life and its social capital in the Valencian Community (vc), we researched the formalization processes and main activities of the associations, as well as the social identities of

the associations and its members. The study opens with a general outline of population characteristics of the mobile EU pensioners. It goes on to provide a theoretical framework for social capital, following Szreter and Woolcock (2004) in their integration of Putnam's and Bourdieu's views on social capital. This section analyzes social capital in relation to public health and transnational migration. The methods used in the empirical study are explained in the third section. The fourth section, provides a map of associational life and analyzes the various forms of social capital. The study ends with a discussion of the results in section five.

### *Mobile EU Pensioners in Spain*

Compared to the migrant population in general, EU and EEA migrants in Spain differ by their older age profile, although they include a large proportion of working-age adults. In particular, Spain has received a relatively large amount of foreign retirees; half the mobile pensioners in the EU reside in Spain (Braun and Arsene, 2009:31, 43). Currently, the Spanish coastline is one of the most attractive places for retirement migration in Europe, and the VC is one of the most popular Spanish destination. As a result, in 2011, EU27, EEA and Swiss retired immigrants 55 years old and over represented 3.8 percent of total population of that age in Spain. According to the Spanish Institute of Statistics, 647 757 foreigners aged 55 and over were registered in Spanish local censuses on January 1<sup>st</sup>, 2010. 29 percent of them live in the VC and 24 percent in the administrative region of Alicante. Moreover, in the VC, 94.4 percent of these foreigners aged 55 and over (149 458 individuals) are foreign citizens of a EU15 or citizens of EEA.<sup>2</sup> The

<sup>2</sup> The principles of free movement and the necessity and proportionality of any restrictions on freedom of movement are basis of regulations responsible for the coordination between social security systems. The territorial scope is the EEA and EU27 (Martinón, 2009). The EU27 adds the EU15 countries (Belgium, France, Germany, Italy, Luxembourg, Netherlands, Denmark, Ireland, United Kingdom, Greece, Portugal, Spain, Austria, Finland and Sweden), plus the countries included in the enlargement of 2004 (Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia) and the enlargement of 2007 (Bulgaria and

best represented nationalities in vc are the U.K. (130 302), Germany (36 543), Romania (32 683), and the Netherlands (16 499). EU migrants aged 55 years old represent 47.69 percent of the total EU migrants in the vc (INE, 2010).

One consequence is that this migration has increased the inactive population in Spain (Braun and Arsene, 2009:33, 49). The symmetry at the EU level continues within Spain, where the province of Alicante in the Valencian Community is clearly the most popular. According to Rodríguez, Lardiés, and Rodríguez (2010:4), the Valencia region has the highest number of foreign individuals aged 55 years and older (accounting for 41.4 % of this population in Spain). Most of this population (86 %) come from EU15, Switzerland and Norway (Rodríguez, Lardiés, and Rodríguez, 2010). Finally, the various concentrations of residences seem to be built upon another significant form of asymmetry by attracting people with similar socio-economic backgrounds. Data are limited but a survey of British pensioners in Italy (Tuscany), Malta, Portugal (Algarve) and Spain (Costa del Sol) unveiled a socio-economic patterning on a country level. The educational level of British older residents in the Italian area was higher than in the other destinations—nearly half had been to college or university—(King, Warnes and Williams, 1998; Braun and Arsene, 2009), while over half of the German and British pensioners in Spain only had lower secondary education or less (Braun and Arsene, 2009:40-41). Within Spain, more highly educated pensioners reside in the Costa del Sol while less educated pensioners are generally located in the Costa Blanca (Casado-Díaz, Kaiser, and Warnes, 2004). Although international retirement migration is an option for ever more people, it is still the privilege of wealthier citizens (Casado-Díaz, Kaiser, and Warnes, 2004:362). They have substantial incomes and a good educational and occupational base, although lower revenues are still well represented (Rodríguez, Casado-Díaz and Huber, 2005:57). Class analysis reveals

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Romania). The European Economic Area includes the EU27 countries plus Iceland, Liechtenstein, and Norway.

more information about such asymmetry. Using a Bourdiesian perspective, Oliver and O'Reilly remark on the importance of class among retirees. As occupational position is not important—most of them are retired or self-employed—its discriminatory power does not play an important role. Conversely, education, together with taste and other expressions of cultural capital, are redrawn as the basis of distinction (Oliver and O'Reilly, 2010).

The impact on the socio-demographic profile of some Spanish regions is clear, as well as on the social space of retirement migrants. The economy of personal services and commerce in dense settlements of Germans or Britons is specifically directed at these mobile EU pensioners and uses their native language to operate, thereby reducing the incentive to learn the local language (Casado-Díaz, Kaiser, and Warnes, 2004:368).

### *Theoretical Framework*

#### *Social capital*

Political and analytical controversies surrounding social capital prevent research scholars from designing a stable operationalization of the concept. “Social capital is a new concept generated from an old idea” (Ferragina, 2009:5), which can be envisioned in the works of Durkheim (1947) and Weber (1904) on social order and conflict. How should the relationship between individuals and their agency on the one hand, and groups, communities or societies on the other be understood? (Ferragina, 2009). The community and individuals will remain central within classical sociology's most popular authors, *e.g.* Tönnies and his distinction between *Gemeinschaft* and *Gesellschaft*; Durkheim and communal life as a remedy for anomie (Portes, 1998), and his mechanic and organic solidarity; Marx and his distinction between class “*an sich*” and “*fürsich*” (Portes, 1998). They are all reflected in later distinctions between strong and weak ties (Granovetter, 1973) and the concepts of bonding and bridging (Putnam, 2000). Bourdieu (1986) approached social capital from a critical perspec-

tive, attributed a central role to power structures, and saw social capital as a means to restrict access to resources and maintain closure for the upper class. Bourdieu's social capital was conceived together with cultural and economic capital as an element related to one's social position and corresponding social inequalities. He argues that social capital is "the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalized relationships of mutual acquaintance and recognition" (Bourdieu, 1986:248). Contrary to the dominant functionalist version of social capital, the critical conflict approach of Bourdieu (1986) and Portes (2001) describes social capital as the outcome of social and ethnic inequalities, rather than as a solution to them.

Later, Putnam (2000) turns back to the functionalist approach and its preoccupation with social cohesion and collective action to develop a second point of reference in the current social capital debate. According to this author, "social capital refers to ... social networks and the norms of reciprocity and trustworthiness that arise from them" (Putnam, 2000:19). Putnam distinguished between bonding and bridging social capital. Bonding social capital originates in relations between members of a network who see themselves as being similar in terms of their social identity (Szreter and Woolcock, 2004:654-655). It is more inward-looking and involves a tendency to fortify exclusive social identities and beef up reciprocity and solidarity within homogeneous groups (Putnam, 2000:22-23). Bridging social capital arises from relationships between people who know that they do not share their social identity (Szreter and Woolcock, 2004:655), but instead share a collective activity "which each values and benefits from, which they cannot achieve alone, and which is not available through the bonded networks they have" (Szreter, 2002:576). Bridging capital encompasses people across different social divides, can produce more inclusive social identities and reciprocity, and is more likely to provide connections to external assets (Putnam, 2000:22-23).

Integrating Putnam's concept with Bourdieu's critical theory, the class dimension of bonding capital becomes noteworthy as the

less and the more privileged groups of society both tend to create mainly bonding social capital (Szreter, 2002:577). Although he did not use the terms “bonding” or “bridging”, Bourdieu (1986) underlined the fact that bridging capital is often not deemed desirable or useful by the more privileged groups because they hold a social identity that has a shared belief in their self-designated superiority towards less privileged groups (Szreter, 2002:578). He argued that one’s social position partly determines the accessible forms (cultural, economic, social or symbolic) and amounts of capital. Poor people will predominantly create social capital because it is the only relatively abundant form at their disposal. For the distinction between bridging and bonding, Putnam (1995, 2000) referred to Gittel and Vidal (1998), who based themselves on Granovetter (1973) and Szreter (2002:575). They argued that social networks represent the “most fruitful micro-macro bridge” as “it is through these networks that small-scale interaction becomes translated into large-scale patterns, and that these, in turn, feed back into small groups”. More specifically, Granovetter (1973:1361) related the strength of interpersonal ties to macro phenomena as “diffusion, social mobility, political organization and social cohesion”. He argued that stronger ties will generate greater overlap in the friendship circles of two individuals, creating a highly dense network, so that “the stronger the tie connecting two individuals, the more similar they are, in various ways” (p. 1362). Weak ties will result in a deprivation of information from distant parts of the social system. On a macro level, such deprivation indicates a fragmented society in contrast to a socially cohesive society (p. 1374).

Ferragina (2009:3) describes social capital as “generated collectively but individuals and groups can exploit it at the same time”. Similarly, Szreter and Woolcock (2004:655) do not see social capital as the property of individuals. Central to their concept of social capital as a group or network property is the transitivity of reciprocity (p. 655), which can be spontaneously generated when there is a mutual understanding of mutually compatible goals that are based upon a shared sense of fairness and mutual respect



(Szreter and Woolcock, 2004:656). The spontaneous advancement of transitive reciprocity is highly likely in bonding networks because others are “alike” and therefore “no further justification is required for a default assumption that cooperation and trust are appropriate” (Szreter, 2002:576). However, in the case of bridging networks where individuals are unlike, an unequal access to power and resources can inhibit trust or incentives to bridge, thus reciprocal relations will hardly develop spontaneously and must be “carefully created” (Szreter and Woolcock, 2004:656). This vertical variant of bridging capital was renamed *linking capital* by Woolcock (1998), and refers to the “norms of respect and networks of trusting relationships between people who are interacting across explicit, formal or institutionalized power or authority gradients in society” (Szreter and Woolcock, 2004:655). Such networks and institutionalized relationships among unequal agents take on a democratic and empowering character as long as they are built on a mutual understanding of mutually compatible goals (Szreter, 2002:579). The introduction of linking capital in the bonding-bridging framework reconciles Putnam’s (2000) focus on support networks with Bourdieu’s (1986) focus on inequalities and resources. Moreover, linking capital also takes into account Granovetter’s (1973) hypothesis that trust in leaders depends largely on intermediary relations that can serve as check points.

### *Transnational Migration and Social Capital*

Social capital implicates social networks (Zetter *et al.*, 2006:12) and since the 1970s it has generally been agreed that networks play a crucial role in patterning and sustaining the migration process itself (Vertovec, 2009:38; Kyle, 2000:5). Portes and Bach (1985:10) stated that migration “can be conceptualized as a process of network building, which depends on and, in turn, reinforces social relationships”. Social positions and power (Portes, 1995) as well as political, ideological, institutional and historical processes (Kyle, 2000:72) all have a major impact on the relational and structural embeddedness of migrants’ networks and their

social capital. Putnam (2000) identifies social capital as the crucial element in a social organization and therefore it is often associated with research on associations. Studies have shown the important but ambiguous role of organizations in migration processes in the host-societies (Odmalm, 2004). Triandafyllidou (2008) argues that immigrant civic activism, which may appear to focus on diasporic ties and ethnic community building, often becomes a lever for transcultural capital and transcultural community building. The bonding capital of these cross cultural associations can thus both stimulate and inhibit the creation of bridging and linking capital.

Critical concerns question the relevance of social capital theory to the very different setting of migrant communities. According to Zetter *et al.* (2006), bonding, bridging and linking social capital offer significant explanatory value in local integration. Their findings made them conclude that their social capital constitutes “the currency of differentiation, fragmentation and exclusion, not a vehicle of social cohesion that Putnam’s concept implies” (Zetter *et al.*, 2006:11). Putnam’s thinking on social capital of immigrant communities and ethnic minorities concluded that in the short run, diversity diminishes trust both outside and within one’s own community (Putnam, 2007). However, the distinction between social capital as an associational process (Putnam, 2000) and as a material commodity (Portes, 1995:2) is especially relevant in new migrant communities. Findings among refugees saw bonding capital rather than bridging capital as more useful to increasing social capital (Zetter *et al.*, 2006:11). These studies mainly discuss underprivileged migration while retirement migration research remains mostly unexplored. However, research has shown that mobile EU pensioners tend to create a “community of Heimat” or “Gemeinschaft” within the host society (Alaminos and Santacreu, 2009; Simó and Herzog, 2005). Retired migrants maintain a relatively intense level of contact with their family and friends in their country of origin, so they transform their social space into a “transnational social space” (Pries, 2007) which crosses the borders of nation-states. Moreover, nation-states are not necessarily entirely integrated into transnational social spaces

and might appear modified in transnational spaces compared to the nation-state appearance in national social-spaces. Although transnational EU migrant pensioners might have access to all the resources they need through the maintenance of intense personal networks, the welfare state of the host country might in the end prove to be surprisingly important for them when ageing increases the possibility of health and mobility problems.

### *Methods*

The aim was to analyze social capital and its empowering impact provided by the associations. On one hand, three associational attributes: 1) registration with local government, 2) identity based on citizenship, common language, religion, affinities, etc., and, 3) main activity, and on the other hand, individual discourses (organizational facts and personal territorial identification processes) were studied. We used Putnam's (2000) concepts of bonding and bridging capital plus the additional concept of linking capital (Szreter and Woolcock, 2004) within Bourdieu's critical framework. The possible networks of bonding and bridging social capital are "multiple and diverse, influenced by the whole range of complex, politically-negotiated ideas about social identities and by individuals' own interpretations" (Szreter, 2002:576). Therefore, we focused on bridging, bonding and linking capital from a territorial identity perspective as an indication of one's position in relation to the host society's national space. The fieldwork was conducted during 2005 on the Costa Blanca in the vc. The organizations created by retirees (citizens from the majority of EU15, Norway and Switzerland, as previously discussed) in the Costa Blanca were quantified and mapped. The officially registered associations were counted and advertisements for associations were identified in the most important local newspapers<sup>3</sup> written for non-national EU residents (in English, German, French and Dutch). These are

<sup>3</sup> *CB Nachrichten*, *CB Zeitung*, *La Verdad-Deutsche Ausgabe*, *Hallo*, *Weekly Post* for the Costa Blanca, *Costa Blanca News* and *CB Friday* as well as a wide range of free papers.

considered nodal points in the social network that fulfill a wide range of functions and inform readers about social life. The information included in the announcements used to describe the aims, activities, and sociocultural profiles was analyzed.

The registration of an association provides it with linking social capital because it establishes a connection with persons on a higher level of political power. Through registration, associations are known to government officials and can officially be taken into account along with other registered associations. The identity-markers in group names and the main activity of the association can promote favor any of the three versions of social capital, *e.g.*, the Municipal Union (linking), the Gay-Straight Alliance (bridging), or the Bible Group (bonding). Of course, identity-markers in group names only tell us something about the kinds of social capital generated if these markers are perceived as important by the members. A Catholic youth movement can have a Catholic reference in its group name, but if members practice another religion or no religion at all, that group name does not afford valid information about the social capital of this group. Therefore, the validity of the information provided by the identity-markers was assessed through a comparison with the identity discourses in the interviews. The form of social capital generated by associational activities depends firstly on the social identities of the people involved. Using this information in the newspapers, it was possible to map out the organizational landscape.

Eighteen qualitative interviews in the Costa Blanca area were conducted with leading people from EU-residents' organizations. Following a qualitative, epistemological model, the sample was not chosen using a quantitative standard of representation. Instead, the aim was to determine the objective organizational characteristics and the most important selection criterion was the respondent's affiliation to different types of organizations. In addition to the organizational facts, respondents were asked for their personal territorial identification processes. Using pre-established narrative interview guidelines, data were collected about the history of the organization, its context, internal opera-

tions, formalization towards the host society, and social and civic participation. Apart from one open question, issues of identity were treated indirectly. Interviews were conducted in French, German, English and Spanish. These data were complemented by three in-depth interviews with officials in charge of local and regional administrations and by six months of observations carried out in a German social network on the Costa Blanca (*Soziales Netzwerk Costa Blanca*), which tries to cope specifically with the German community's problems in gaining access to health services.

### *Results*

#### A MAP OF ASSOCIATIONAL LIFE

##### *Administrative Registration*

Seventy-eight organizations of European residents were identified as being registered in the Valencian Community, most (73) in the province of Alicante where the Costa Blanca is located (Simó and Herzog, 2005). While identifying the advertisements of European residents' associations in the newspapers, however, a further 646 organizations were found: 48 in newspapers written in Dutch, 396 in English, three in French and 199 in dailies written in German. The language of the newspaper can only be considered an approximation to the language spoken in the association itself. Occasionally, due to the lack of their own important communication platforms, some organizations, like those where Norwegian or Flemish was spoken, used the major newspapers to communicate with residents who might be interested in their activity. These data show that only 10.8 percent of the 724 associations identified appear in the register. Without formalization, no official contact between these groups and local administrations had been established. It is worth mentioning that some associations that were not registered in Spain were registered in their countries of origin.

### *Identity*

The most common identity markers were those of nationality or region (142 associations), religion (47) or language (16), although other types of reference were found such as belonging to a particular profession (*e.g.* Royal Air Force Association), or suffering from a disease (*e.g.* Cancer Self-help Group). The most important identity marker in the name or in the description of the association was national or regional belonging (*e.g.* German, Dutch, Flemish and Scottish). Although most of these markers referred to only one nationality and thus mainly favored bonding capital, there were a significant number of organizations with a reference to internationality in their titles (*e.g.* international dancing club) which should support bridging capital. Religion was also found to be an important parameter of group cohesion (51 organizations). A direct reference to the language did not seem necessary for most of the organizations, yet their names were usually either written in the languages of reference, or the nationality itself referred directly to a language. Nevertheless, especially for those languages spoken in more than one European country, mentioning the language in the name could be an important sign of a multiregional identity. Such group names would thus be able to create social capital through the bonding of people who speak the same language and the bridging of people of different nationalities. Note that identity-markers in group names are relevant indicators only insofar as the composition of the members reflects the group name.

### *Group Activities*

The group name and the description of the group were used to identify the main aim of the organization. The aim of most of these associations is sociability, which included specific leisure activities (*e.g.* arts and crafts, dancing) as well as a general frame for different activities within the same association; more than two thirds of all organizations were dedicated above all to leisure and

social activity. In some of them, sociability in general is the main goal (176), whereas others were organized around recreational or cultural activities (160), active sports (100) or other hobbies (*e.g.* computer, sport supporters). Despite this variance in leisure activities, all the groups that seemed to foster mainly bonding social capital as participants lived in what O'Reilly (2007) has called the “mobility-enclosure dialectic”. That is, in the absence of family, cultural or administrative ties, and cultural or administrative resources—which were shaped in their societies of origin—these associations allow sharing of the same language, substantial information, etc. The creation of bonding capital through leisure activities between British pensioners in Calp on the Costa Blanca in Spain has been documented by Casado-Díaz (2009).

Many self-help groups, and some of the solidarity organizations, respond directly to a lack of social aid from the Spanish state or the family. Depending on beneficiaries and participants, these self-help or solidarity groups favor bonding or bridging capital. The associations examined provided, above all, bonding capital. Neighborhood Watch groups usually follow a British model of cooperation between neighbors and local police. These groups achieve a bridging together within different European nationalities in residential areas. In addition to these bridging possibilities, they also foster linking capital as they cooperate with local police. Environmental concerns and animal welfare are also an important field, which again, provides mainly bonding capital. Religious and other spiritual groups usually create bonding capital. They respond not only to the need for spiritual aid, but also play an important role in the organization of solidarity and mutual aid. Political and social organizations are generally formed in relation to local politics in Spain, for example, property owners' lobbying organizations, but there are also local groups of foreign political organizations, such as the British Labor Party. Through their activities, these groups provide linking capital.

As with administrative registration, the study revealed two different forms of linking capital: one that bridges nationalities and one that bonds within one nationality. Groups can be linked to

different power levels in the host country, but they can also extract linking capital through links to the government of origin. It is important to stress that most associations perform more than just one function and that the borders between the aims of the association are often blurred. Sociability and leisure associations usually play an important role in orientating and informing newcomers as well as residents who suddenly face specific problems within the host society. Moreover, they organize voluntary support for social and political actions (usually aimed at their own language, national or religious community). On the other hand, sociability and leisure are also an important, implicit part of the other associations such as self-help groups and spiritual organizations. The results revealed a bias towards the creation of bonding capital. Nevertheless, in some cases, such as political participation, neighborhood safety or solidarity towards others, the associations favored the creation of bridges towards, and links with the host society.

#### *Individual Discourses*

The respondents described the associations as being self-referential and almost without any contact with the host society. The creation of bridging capital was an ideal that was mentioned but not always sought. Nevertheless, there were signs of bridging capital, like a German religious choir participating in Spanish masses. Registration of the association was not perceived as relevant or desirable. This topic can be related to European Union policies which allow mobile EU citizens to move freely without the need for registration. Moreover, some respondents preferred communicating with the government of origin than with their host nation. However, the main activity of the organization did sometimes favor the creation of linking capital, *e.g.* providing neighborhood safety or organizing political participation. They often felt that their partner for social questions was their own embassy, rather than the Spanish administration. It is clear, however, that in general, formalization through the registration of associations was not taken as a means of creating linking capital. This seems similar



to the lack of registration of EU residents in the local register and could be an indication of a certain distance towards the host society and its administration. As O'Reilly mentioned when referring to U.K. residents, immigrants can avoid registering with the town hall in the same way they avoid paying tax and social security and thus work informally (O'Reilly, 2007). Evidence from a survey conducted in Andalusia proved that non registration is related to the ignorance of Spanish administrative rules and to the fear of being controlled by the police, paying taxes, and losing certain rights and benefits in their countries of origin (Rodríguez, Lardiés, and Rodríguez, 2010).

During the interviews, the question of whether an organization was registered or not opened the door to comments on their (lack of) contact with the Spanish society in general, and with the Spanish authorities in particular. Registration converts an organization into an official dialogue partner of the Spanish administration, including the association in all types of local and regional civic participation procedures. In addition, being registered allows the organization to apply for resources like financial aid or access to local community centers for regular meetings. Although most of them were not officially registered, our respondents talked widely about the topic. Four main reasons for non-registration were inferred: *Ignorance*. Even organizations with a relatively long tradition and strong internal formalization were unaware of the benefits or the process of registration. For some respondents, our interview appeared to be the first time that they had been confronted with this question. The ignorance of local structures was all the more remarkable as all the interviewees showed a high level of general knowledge about Spanish culture, politics and lifestyle in general. Yet their too general and often simplified view of Spanish society did not seem to permit the recognition of local administrative structures. *E.g.*, "This [registration] is not necessary here...I still haven't informed myself" (self-help group).

*Incompetence*. Such general ignorance led to incompetence in registering, and general incompetence. Moreover the lack of sufficient language skills led in turn to ignorance. Those organizations,

which sought to establish contact with the host administration therefore often failed. Another factor exacerbating this incompetence was the temporality of their residence over the year as many residents return to their countries of origin for some months (especially during the summer).

*Reluctance.* There was also, in some cases, an open reluctance to register driven by organizations feeling their independence and their open structures would be threatened by accepting local rules. Some groups refused formal organization and consequent responsibilities entirely, or feared the control of the Spanish state. As one informant claimed, “We don’t work like you are used to with organizations. Here everyone is welcome” (spiritual organization); and “The formalization of the organization converts help into a duty” (self-help group).

*Lack of Need.* The lack of need for registration and the advantages that registration could offer were not offered as an explicit argument, but was implicit in the discourse, *i.e.*, as an underlying moment in the reasoning of our interviewees. Associations often did not need financial aid or places to meet, as they met in bars or social clubs and had alternative sources of finance.

When asked about their contacts with Spanish society, respondents said that they often felt that their work was not appreciated by the local administration. They did not see this as an effect of their invisibility to the local administrative structures but as a reason for mistrusting the administration. This reasoning seemed to be related not only to a feeling of not belonging to Spanish society, but also to an orientation towards the governmental structures of their countries of origin. There seemed to be a strong differentiation between “us” (whether in national or linguistic terms) and “them” (the Spanish administration and Spanish society). This differentiation leads to a strong sense of identity and to bonding rather than bridging or linking capital. Although references to internationality were found in certain associations’ names and descriptions, discourses proved that these references often formed part of a positive European identity even if this did not mean that the organization’s membership was drawn from outside a specific

language group. Regarding regional identities, all the interviewees showed a strong sense of belonging to their country of origin. Their activities were directed towards the national collective and the frame for their argumentation was usually the society of their origin. The importance of Diaspora (Beck-Gernsheim, 2004) in this identity building was so strong that they regarded themselves as European residents after their national identification. Our respondents used the term “European resident” to refer to mobile Europeans within Europe. Although Spaniards are EU citizens as well, in this context, they are not included in the term “European resident”. In addition to this Spanish-European divide, the difference between the label “immigrants” and “European resident” is further underlined in that the term “immigrant” was usually applied to migrant “workers” and connoted lower socio-economic status. This suggests that socio-economic distinction possibly plays a central role in their identity as European residents.

In some associations, the language aspect of identity provided a form of bridging capital. This was the case in the German-speaking collective as it included Germans, Austrians and Swiss. The French-speaking collective tried to attract different nationalities as well although the French nationalities included in the collective were divided between western French-speaking countries (French, Belgian, Luxembourgish and Canadian) and African French-speaking countries. However, it was in no way perceived that national and language identity led to an exclusion of members of the host society, as reflected in the phrase: “This is an international association. We are open for every foreigner living here” (leisure group).

Regarding the question of the influence of these discourses on the possibility to facilitate or hinder access to social and sanitarian aid, it is important to underline the fact that organizations based on identities formed by regional or linguistic parameters facilitated a relatively high level of well-being and an easy organization of leisure time. Strong bonding capital afforded European residents a feeling of comfort and “Heimat”. Nevertheless, self-help and charity groups are voicing concern over major social and health

problems for a growing number of these residents. The lack of participation within the structures of the host society could also become a problem when they require public aid. In other words, due to the fact that bridging capital was seldom systematically created, there are few resources to bridge the gap between individuals and the helping social structures of the host society when required. These findings suggest a differentiation within the tripartite model of bridging, bonding and linking social capital by articulating different resources to build social capital. In regard to linking capital, the discourses suggested a qualitative difference between links with the host country and links with the country of origin. The latter were often seen as more trustworthy or advantageous. Furthermore, it appeared that it could be more complicated to create links with the host government than with familiar institutions “at home”. It might therefore be useful to distinguish between “bonding links” and “bridging links”. Bonding links cross power levels but not meaningful identity borders, *e.g.* the registration of emigrant associations in the country of origin or activities organized by local associations of political parties from the country of origin. Bridging links cross both power levels and meaningful identity borders, *e.g.* the registration of immigrant associations in host country or the collaboration of neighborhood watch groups with the local police.

*Case Study of a Social Network: Soziales Netzwerk Costa Blanca*

Putnam (2000:326) stated that “of all the domains in which I have traced the consequences of social capital, in none is the importance of social connectedness so well established as in the case of health and well-being”. Others recognize the importance of social capital in relation to the field of public health (Szreter and Woolcock, 2004:651). In response to the growing social needs of the elderly, many of the mobile pensioners in VC have come together with the goal of organizing assistance and solidarity. But as the requirements, the size and the diversity of the community are currently rising, there is a growing need for this assistance to be

coordinated. Various forms of social networks arose to organize such coordination, like the Social Network Costa Blanca (Soziales Netzwerk Costa Blanca), whose emergence, and subsequent decline, could be seen as symptomatic of the problematic way pensioners try to satisfy social needs. The network was founded in 2004 with the help of an organization of retired social workers in Germany, the German embassy and the local German protestant vicar. It included different volunteers, mostly from a Christian background, and the leaders of leisure groups. The situation that led to the need for greater exchange and organization was described by the members as follows: 1) Although most residents go back to their country of origin when one partner dies or when they become increasingly dependent, a growing number with limited economic and social resources remain in Spain. 2) These people often show a lack of social participation in Spanish society and have little or no knowledge of the local language or the Spanish welfare state. 3) The family is probably the most important pillar of the Spanish welfare state, yet most of the elderly mobile European residents have few or even no family bonds at all in Spain. 4) In this situation of need and helplessness, there is growing criminality that exploits the disorientation of these older people. 5) Self-help and charity groups are unable to meet these growing social needs.

The aims of the network were therefore: *a)* to organize a network of reliable social services; *b)* to help solve specific social problems faced by the German collective; *c)* to prepare the way for the future employment of a German social worker, and; *d)* to get to know the work of other groups and to look for support for their own work. The social services they wanted to provide were designed in reference to German residents. Similarly, their attempts to acquire resources were directed towards German residents in Spain and the German state. They contacted German speaking groups in order to recruit volunteers and they tried to obtain financial assistance from the German state in order to employ a social worker—even though it is the Spanish state that is responsible for the well-being of its European citizens.

Their discussion about the lack of transport for wheelchair-bound people provides a good example of their problem-solving strategy. Public ambulances only operate in the event of an emergency and the group did not know of a taxi service that was prepared to transport wheelchairs. During the discussion, at no time did the participants mention that this might also be a challenge for pensioners of other nationalities. Problem-solving strategies which included contact with the host society were not discussed. Instead, the only option discussed was that of seeking financial aid from German public or non-governmental institutions in order to buy a car and organize a voluntary taxi service. Efforts to recruit more volunteers by means of advertisements in local German newspapers or by distributing flyers written in German and distributed to other German meeting points and associations had an unexpected effect. Instead of volunteers, a lot of people with often severe health needs showed up. This revealed the considerable need for assistance and highlighted the inability of the existing network to cope with these problems. Meanwhile, a visit by a retired social worker from Germany, who organized contacts with various Spanish authorities, alarmed the local Spanish administration over the healthcare needs of certain mobile EU pensioners. The retired social worker and the local spokesmen both clearly stated that the institutions of the host society are responsible for their EU citizens. However, only formalization, *i.e.* the registration of an association, could have turned the network into a dialogue partner between the administration and the beneficiaries of financial and infrastructural aid. Unfortunately, formalization and adaptation to formal and informal structures of the host society was described as too complicated by the members of the network. Consequently, the option that was described as the only viable one by the German retired social worker, as well as by the local authorities, was refused. In depriving itself of any interlocutor, the association possibly did not recognise the value of formalization within the host government. Eventually, the group found out that the network by itself could not mobilise enough resources to subsist and therefore gave up.

In short, national identity is key in the reasoning of this association. The acquisition and provision of resources was planned with the German state and the German residents as the only points of reference. The association ignored the welfare state of the host society and did not seek partners among other nationalities. Without the necessary connections with Spanish private and public healthcare provisions or with the Spanish social space in general, the network saw itself deprived of linking and bridging social capital.

### *Discussion*

This study sought to provide a more complete image of mobile EU pensioners and the forms of their social capital. We explored their associational life by means of three indicators (administrative registration, identity-markers in group names and main activity) and also by conducting in-depth interviews. Group names of associations in the VC predominantly marked national or linguistic identities as salient identity borders in the pensioners' post-migration social space. In the discourse we encountered a similar dominance of a national or linguistic framework of reference accompanied by a sense of "superiority". Individual discourses and the associational attributes both point towards a clear dominance of bonding capital. In general, bridging and linking capital were underdeveloped within the associations of mobile EU pensioners in the VC. The social spaces of our respondents and their associations established very few links with Spanish society. Considering the results, the map of associational life and the respondents' discourses both confirmed the non-congruence of the transnational social space within the national space of the Spanish welfare state. This discrepancy was reflected in the arguments for non-registration of associations where a perceived non-necessity goes hand in hand with incompetence, unawareness and reluctance. The lack of integration of the Spanish nation-state into their framework of reference might pose problems when they need access to Spanish welfare state provisions. Our case study

clearly demonstrated the barriers faced by associations in obtaining assistance from within Spanish society. The concept of “European residents” reflects this national-transnational discrepancy. The term is generally used to refer to mobile Europeans living in a European space in contrast to Spaniards who are situated in a national space.

Bourdieu (1986) used the term “social capital” to refer to the resources to which individuals have access as a result of their connections to particular groups, which in turn is related to one’s social position in the power structure. In other words, the creation of social capital does not occur *tabula rasa* (Cheong *et al.*, 2007:38). In the context of migration, capital brought by immigrants from their country of origin can become another basis, rather than a cure, for imposed social inequality (Cheong *et al.*, 2007:38). In a recent Bourdieusian analysis of class among British lifestyle migrants in Spain, Oliver and O’Reilly (2010) conclude that there is ample evidence of class reproduction and the reinforcement of economic position.

Part of the cultural capital of mobile EU pensioners experiences a dramatic drop in value when they live in Spain. Their socialization has taken part in another national space and this provides them with nation-specific capital. In Spain, they are left with a language that most do not understand, and the knowledge of the structures and the functioning of their state of origin is of little use when accessing the Spanish welfare state. Their capital diminishes in value but it also prevents them from creating other versions as long as they can cover all their needs with existing capital. Our population shares its high amount of bonding capital with the socio-economic extremes of society: “the elite” and “the poor” (Szreter, 2002:577). The elite deliberately chooses to mainly invest in bonding relationship, while the poor predominantly bond because they have no choice. Although more empirical research is necessary, we suggest that our pensioners share characteristics with both extremes. Their high level of bonding capital, their lack of links with the local government or bridges to other nationalities, especially Spanish, is not merely a sign of



a privileged position. It is partly result of the invalidity of their capital in the Spanish national space.

This dual origin of the bias toward bonding capital is reflected in the discrepancy between their subjective identifications (they “choose” to only bond with co-nationals) and their objective individual characteristics (they are unable to bridge because they lack language skills and other nation-specific forms of capital). On the one hand, identity discourses reveal a self-confident (or even superior) identification in relation to non-EU immigrants and Spaniards. This might be due to their previous social position in their country of origin, from which they were possibly confronted with third country economic migrants with a low socio-economic status, and have a memory of similar Spanish economic migrants before 1974. In addition to their identification processes, many retired immigrants have substantial incomes and a privileged economic position. The identity discourses and their economic capital points towards an elitist position that creates a bias towards bonding capital. Their migration to Spain has possibly “damaged” their previously held privileged position with regards to welfare state provisions, the private health sector and other informal arrangements, and altered the meaning of their cultural and linguistic capital. Moreover, among EU movers who all have to deal with the above problem, some groups of EU pensioners have a relatively low social background and educational level, which they share with the least privileged EU movers. Their higher age also puts them in a more vulnerable position. These characteristics also foster bonding capital but rather out of necessity than by choice.

The importance of socialization to obtain access to welfare state resources has been shown by various scholars. “For Bourdieu, networks and access to resources are shaped by history and powers” (Arneil, 2007:46). At least, in the case of the younger and still working mobile EU nationals, Favell (2003) has shown that, despite all the legal EU measures and the relative lack of discrimination, they still face social and cultural barriers, such as accessing specific national rights related to taxation and social security

provisions. This research supports the idea that legal and social rules are still very country- and class-specific. EU citizens that grew up in other nation-states, who are entitled to national rights through EU measures, might find it quite hard to find their way in a new welfare state system.

*A Final Suggestion: The Fourth Form of Linking Bonding Capital*

Szreter and Woolcock (2004:656) defined linking capital as “carefully created” bridging capital, in contrast to spontaneously created bridging capital, which is based, like bonding capital, on horizontal relations. Linking capital reflects “relationships of trust between members of a network who know themselves not only to be different in terms of social identity (bridging social capital) but also in terms of their institutionalized endowments of power and resources” (p. 656). However, Szreter and Woolcock did not speak about transnational social spaces. The clear dominance of country of origin resources for associations in Spain suggests a grading in the spontaneity with which relationships are created. We found very little linking capital within the associations. One form links the association to the host government, *e.g.* registered associations or associations that were active within local politics or local police forces. A second form links the association to the government of origin, *e.g.* through registration in the country of origin or as representatives of political parties. In addition, the case study of a German association clearly revealed the central role of the nation-state of origin in obtaining resources.

	<i>Social identity</i>	
<i>Power and resources</i>	=	≠
=	Bonding	Bridging
≠		Linking

Since all the associations operate in Spain, links with the state of origin can be expected to be less valuable than links with the Spanish state. Then why do they opt for linking with the govern-

ment of origin? The case study showed that the establishment of linking capital with the country of origin posed less difficulties than formalization and adaptation within the Spanish state, which was described as too complicated. In other words, the lack of knowledge of and trust in the Spanish government led mobile EU pensioners to rely on their government of origin. *A qualitative difference between linking capital in the country of origin and linking capital in the host government is thus suggested.*

Following Szreter and Woolcock (2004), who based their conception of social capital on Putnam (2000) and Bourdieu (1986), we propose two qualitative factors that influence the level of spontaneity in the formation of linking capital. Firstly, the more similar the individuals in the network, the more trust is seen as a given. As mentioned above, cooperation and trust are assumed when others are considered to be alike (Szreter, 2002:576). Here this factor is reflected in the continuum between bridging and bonding social capital. Secondly, the higher the perceived equivalence between the endowments of power and resources among the persons in the network, the higher the perceived fairness of the relationship. The second factor refers to the continuum between vertical (linking) and horizontal (bonding-bridging) social capital. The interplay of the two factors should tell us something about the likeliness of spontaneous relations. We argue that the creation of a transnational social space causes a rearrangement of previous social positions. In transnational spaces, national identity has come to the fore. During this process, the government of the country of origin becomes a partner with a similar salient social identity to the mobile EU pensioners themselves. From a nationality perspective, it becomes possible to create bonding capital with the government of origin in which similar motivations play a role shown by their tendency to prefer relations with co-nationals above relations with other nationals. However, an important difference between the government of origin and co-national residents in Spain is the level of power and access to resources. Therefore, we suggest that in the transnational context of EU pensioners, a fourth form of social capital is created. The perception of “similarity to” and trust in

persons with different endowments of power and resources can lead to a bonding variant of linking capital (or a linking variant of bonding capital). In accordance with our results, we would suggest complementing the above scheme with further research:

<i>Power and resources</i>	<i>Social identity</i>	
	=	≠
=	Bonds	Bridges
≠	Bonding links	Bridging links

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