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Grey Zones and Blind Spots: Reflections on Knowledge Production in Portuguese Migration Studies

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Abstract

In the Portuguese context, the figure of "the emigrant" has persisted over time, permeating media representations, political discourses and scientific productions. While the sociology of migration has produced numerous texts on "emigration" and "return", there are few reflections on the conditions of knowledge production. This paper aims to contribute to a critical reflection on the categories employed in research produced in Portugal. Drawing on a series of epistemological questions arising from the ethnographic work I undertook during my doctoral research (2018–2022) and postdoctoral research (2023–2024), I explore several grey zones and blind spots in studies on Portuguese migration within Europe. Specifically, I focus on the notions of "emigrant", "age", "life course", "gender", and "ethnicity", advocating for a reflexive approach to the so-called "Portuguese emigration" and, more broadly, to the process of knowledge production. This reflection is particularly important insofar as certain categories are proving to be too rigid to account for contemporary mobility patterns, and for the fluidity characterising the lives of individuals with migratory backgrounds and/or origins.

Keywords

Portuguese emigration, reflexivity, epistemology, categories of analysis, categories of practice

Zonas Cinzentas e Ângulos Mortos: Reflexões em Torno da Produção de Conhecimento nos Estudos Sobre Migrações Portuguesas

Resumo

No contexto português, a figura de “o emigrante” tem persistido ao longo do tempo e permeado as representações mediáticas, os discursos políticos e as produções científicas. A sociologia das migrações tem produzido numerosos textos sobre “emigração” e “regresso”, no entanto, são escassas as reflexões sobre as condições de produção do conhecimento. Este texto pretende contribuir para uma reflexão crítica sobre as categorias utilizadas na investigação produzida em Portugal. Partindo de um conjunto de questionamentos epistemológicos decorrentes do trabalho etnográfico que desenvolvi durante as pesquisas de doutoramento (2018–2022) e pós-doutoramento (2023–2024), reflito sobre um conjunto de zonas cinzentas e ângulos mortos nos estudos sobre migrações portuguesas intraeuropeias. Neste artigo, discuto nomeadamente o uso das noções de “emigrante”, “idade”, “percurso de vida”, “género” e “etnicidade”, apelando a uma abordagem reflexiva da chamada “emigração portuguesa” e, mais amplamente, do processo de produção do conhecimento. Esta reflexão reveste particular importância na medida

em que certas categorias se revelam demasiado rígidas para dar conta dos atuais padrões de circulação, bem como da fluidez que carateriza as vivências de pessoas com experiências e/ou origens migratórias.

Palavras-chave
emigração portuguesa, reflexividade, epistemologia, categorias de análise, categorias de prática

Epistemological critique is inseparable from social critique.— Pierre Bourdieu, *Leçon sur la Leçon*

The discourse on the object is part of the object and must be integrated into the object of study or become the object of study itself. — Sayad, *La Double Absence. Des Illusions de l'Émigré aux Souffrances de l'Immigré*

1. Introduction: Towards a Reflexive Approach to "Portuguese Emigration"

Although migratory movements are a structural feature of Portuguese society and a centuries-old phenomenon (Serrão, 1970), population outflows and (re)inflows go through cycles and are influenced by shifts in the country's economic and political landscape. Despite variations in intensity over time, these flows—whether outward or inward—have remained continuous, as has academic interest in the subject since the mid-1960s. Conversely, political and media attention to the migratory movements of Portuguese nationals has fluctuated. The theme of "emigration" has gained visibility during times of crisis and lost relevance during periods of greater economic and political optimism. By the 1990s, this shift in focus had led to "the illusion that the country had become a country of immigration" (Góis & Marques, 2018, p. 126). This lexical change reflected Portugal's self-representation as a "developed" country which began to receive foreign labour, like the other members of the European club. However, Portugal has never ceased to be a sending country: "emigration has been a constant phenomenon in Portuguese society (...), so even when emigration is not explicitly mentioned, we should be aware that it exists" (Padilla & Ortiz, 2012, p. 161). At the turn of the 20th century into the 21st century, however, the persistence of outflows was overlooked: "Portuguese emigration acquires a status of near invisibility in the approach to migratory phenomena associated with Portugal, both on the part of politicians and academics" (Malheiros, 2011, p. 133). In the national media, while "emigrants" are occasionally given prominence on Portuguese television channels, the focus tends to be on the "integration, success and attachment to origins" (Antunes da Cunha, 2009a, p. 219) of those who have been living abroad for several years. In the press, news related to "Portuguese emigration" is mostly tied to specific events (for example, Portuguese legislative elections, the Council of Portuguese Communities, or visits by the Secretary of State) and only sporadically to migratory movements. It was in the aftermath of the 2008 economic and financial crisis, and especially during the so-called "years of the troika", that "emigration" gained prominence

in Portuguese public opinion. Between 2011 and 2013, the volume of outflows was comparable to that of the late 1960s (Pires et al., 2020). Since then, news has proliferated regarding the departure of "the most qualified generation ever" (Marques et al., 2024)[1] , who "leaves because they cannot find employment in their country" (Firmino & Silva, 2024, para. 1). As a result, recovering and retaining this human capital has become a political priority since 2013 (Lusa, 2013). In 2015, the initiative "VEM – Valorização do Empreendedorismo Emigrante" (Promotion of Emigrant Entrepreneurship) was adopted; in 2017, the project *Empreender 2020: Regresso a Portugal de uma Geração Preparada* (Entrepreneurship 2020: Return to Portugal of a Prepared Generation) was implemented and, in 2019, the "Regressar" (Returning) programme was launched[2].

The last decade and a half has been marked by successive crises, accompanied by "an accelerated growth in the outflow of Portuguese citizens, both qualified and poorly qualified, although the media particularly emphasises the outflow of qualified human resources" (Padilla & Ortiz, 2012, p. 165). This is empirically observable when one regularly follows the news: they tend to focus on young people with higher qualifications. These are the individuals that governments seek to retain, recover or attract and for whom there is strong international competition. The prominence of "qualified emigration" is also evident in academic production carried out in Portugal (e.g. Gomes, 2015; Lopes, 2014; Peixoto et al., 2016). Thus, the migratory movements of certain population categories prompt more interest (and concern) than others, which end up being silenced and rendered invisible. This differentiated interest—reminiscent of the parable "The Blind Men and the Elephant"[3], in which each person only sees a certain part of the animal — results in a biased perspective of Portuguese migration, leading to partial conclusions about its demographic and economic consequences, which can contribute to social tensions. In this context, academia can play a role in deconstructing biased representations or, at least, avoid reproducing and consolidating them.

I do not intend to address all the issues that merit discussion in a critical analysis of "Portuguese emigration". Instead, I will focus on a set of questions that, in my view,

[1] "We're losing the most qualified generation ever", Grande Reportagem SIC, May 30, 2024. This phrase has been echoed in various political speeches, such as in the Acção Socialista, on December 21, 2017 "Securing the Most Qualified Generation is the Key to the Country's Competitiveness" (https://ps.pt/fixar-a-geracao-mais-qualificada-e-a-chave-para-a-competitividade-do-pais; accessed on May 31, 2024). It is also reflected in official documents, including the Council of Ministers Resolution No. 60/2019 (Resolução do Conselho de Ministros n.º 60/2019, 2019).

[2] "VEM – Valorização do Empreendedorismo Emigrante" (Promotion of Emigrant Entrepreneurship) was an initiative adopted under Axis V of the Strategic Plan for Migration (2015–2020), approved by Council of Ministers Resolution No 12-B/2015 (Resolução do Conselho de Ministros n.º 12-B/2015, 2015) and funded by the Operational Programme for Social Inclusion. *Empreender 2020* (Enterpreneuship 2020) was a project by the AEP Foundation, supported by Portugal 2020 under the Compete 2020 programme. The Regressar (Returning) programme was approved by Council of Ministers Resolution No. 60/2019 (Resolução do Conselho de Ministros n.º 60/2019, 2019) and has since been extended and renewed twice — by Council of Ministers Resolution No. 124/2020 (Resolução do Conselho de Ministros n.º 124/2020, 2020) and Council of Ministers Resolution No. 148/2023 (Resolução do Conselho de Ministros n.º 148/2023, 2023) — with its end date set for December 31, 2026.

[3] This parable, documented in Buddhist, Hindu, and Jain texts, is used to illustrate the limits of perception. In the story, six blind men attempt to describe an animal they have never seen before—an elephant. Based on their perceptions as they feel different parts of the animal, they each make statements, believing they hold the truth. However, in reality, they are only describing their limited perspectives, not the elephant as a whole.

need to be raised and represent some of the current blind spots in the literature produced in Portugal. My starting point involves epistemological questions that emerged during the fieldwork I have carried out between Switzerland and Portugal[4].

Following in the footsteps of authors such as Janine Dahinden and Bridget Anderson (2021) and Parvati Raghuram (2021), I call for a reflexive approach that pays greater attention to the use and production of categories in the field of migration. The categories we choose in our research undoubtedly shape how social phenomena and actors are perceived. We must, therefore, ask ourselves: what categories are used in the social sciences to discuss migrants and their experiences?[5] How are these categories produced, and by whom? How do they evolve in spatial and temporal terms? As Anderson cautions in an interview (Sager, 2018), "we as researchers have to think carefully about how we make research and the ways in which we are also complicit in creating these categories" (p. 100).

Drawing on my ethnographic work since 2018, I propose to reflect on the notions of "emigrant", "age", "life course", "gender", and "ethnicity" in migration studies in Portugal.

2. The Need to Rethink the Figure of "the Emigrant"

The figure of "the emigrant"[6] permeates political, media and scientific discourses, each tending to influence the other[7]. However, this notion is now outdated. Miriam Halpern Pereira (2013) tried to retrace its origins and found that it first emerged as an administrative category in a law (*Carta de Lei*) of January 31, 1863, which ended rigid forms of control over the internal movement of people and established the conditions for issuing passports to national travellers leaving the country. In 1970, Joel Serrão distinguished between "colonising emigration" and "emigration *tout court*", suggesting that "we should only call *emigrants* those who chose to leave the country for *personal reasons*, freely conceived, independent of official requests *and often in opposition to them*" (Serrão, 1970, p. 598). This distinction, however, lost relevance after the democratic transition and the decolonisation process. The term "coloniser", which had coexisted with "emigrant", fell into disuse and is now only applied to the study of certain contexts circumscribed in space and time[8].

[4] I conducted doctoral research (2018–2022) on the transition to retirement and return migration of Portuguese couples in Switzerland, followed by post-doctoral research (2023–2024) on transnational families and the impact of retirement return migration on the descendants who stayed in Switzerland.

[5] There are numerous categories concerning the Portuguese who left the country and their descendants. This article does not delve into most of them, as that is not its purpose. Rather, this text aims to encourage those working in the field of migration to reflect on the categories they use in their own work, whatever those categories may be.

[6] I use the noun in the masculine (in Portuguese) to emphasise a prototypical concept that emerged in the Portuguese imaginary during the 20th century and has persisted over time. "O emigrante" (the emigrant) is, for example, the name of numerous cafés and restaurants in Portugal (e.g. in Evoramonte, Pedrogão Grande, Castro Daire, and abroad), monuments (e.g. in Lisbon, Monção, Pombal, Ponta Delgada) and streets throughout the country (e.g. in Chaves, Águeda, Ericeira, Ovar). It is also the title of a 1965 song (by *Conjunto Maria Albertina*), and of a newspaper founded in 1970 (now called *Mundo Português*; Portuguese World).

[7] The media often adopt discourses from both the political and academic spheres. Sometimes, they echo these same discourses, mirroring their words and perspectives. However, they also frequently ignore the terminology proposed by specialists, reproduce buzzwords, and miss the opportunity to contribute to the deconstruction of preconceived notions.

[8] For instance, Cláudia Castelo's work (2013) on Portuguese colonialism and the settlement in Angola and Mozambique highlights these issues. For a comprehensive overview of the evolution of emigration policy from the late 19th century until the 1960s, particularly concerning the encouragement of emigration to African colonies, see Pereira (2011).

Although the term "emigrant" has persisted and remains widely used[9] in the national context, international literature has preferred the term "migrant". As French sociologist Abdelmalek Sayad (2006, p. 21) pointed out, emigration and immigration are two dimensions of the same phenomenon[10]. In this sense, "migrant" has the advantage of "restoring the integrity of the emigrant/immigrant by reconciling these two seemingly different figures into one" (Azevedo et al., 2022, p. iii). While "emigrant" and "immigrant" reflect a single perspective — that of the country of departure *vs*. that of the country of destination — "migrant" broadens the analytical scope, capturing both sides of the experience. By referring to "migration" (instead of "emigration"), the focus shifts from the departure or absence from a particular national space to the *movements* between different geographical, economic and socio-cultural spaces (this is evident in studies like those by Rocha-Trindade, 1976, and Charbit et al., 1997). In fact, migrants often undertake multiple migrations between countries (due to failed attempts at return, for instance) or sequential migrations — also called *onward migration* (see, e.g. Ahrens and King, 2023) — moving from one country to another when the conditions that enabled their stay change.

Can the persistence of the word "emigrant" be understood as a remnant of the expectations surrounding their eventual return? National discourses on emigration often encompass proposals related to the opposite movement. Implicitly, the volume of people moving in one direction or another is seen as an indicator of the country's economic and political development.

This may explain why the first electoral programmes of the Partido Popular *Democrático* (People's Democratic Party; 1974)[11] and the Partido Socialista (Socialist Party; 1976)[12] explicitly addressed expectations regarding the return of those who had previously "voted with their feet" (Pereira, 2017, p. 42). Both political parties defended the creation of economic and social conditions that would allow those who had emigrated or gone into exile during the dictatorship to return to Portugal. Although "the high number of arrivals in the late 1970s and early 1980s, mainly from Europe, gave visibility and created expectations about this phenomenon" (Baganha & Peixoto, 1997, p. 28), this influx was primarily due to the economic recession in the destination countries (France and Germany) and the decolonisation process. Ultimately, the return flows fell short of expectations, as indicated by census data (Pires, 2016).

The democratic aspirations that fostered expectations of return were, in fact, contradicted as outflows increased in the early 1980s. This rise was driven by the economic

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[9] See, among other examples, Gomes (2015), Oliveira et al. (2016), Ferro (2018) and Rocha et al. (2020).

[10] This point was also acknowledged by Manuela Aguiar, Portuguese Secretary of State for Emigration between 1980 and 1987, who stated in an interview in 2014: "emigration also means immigration: a person is both an emigrant and an immigrant; they bridge the gap between two societies; they are both at the same time" (Pedroso, 2014, p. 325).

[11] Available at https://www.psd.pt/sites/default/files/2020-09/programa-partido-1974.pdf (accessed on May 31, 2024).

[12] Available at https://ps.pt/wp-content/uploads/2021/03/1976.25.abr_Programa.para_.um_.Governo.PS_Vencer.a.Crise_.Reconstruir.o.Pais_.pdf (accessed on May 31, 2024).

recovery in the most industrialised countries, while Portugal grappled with a crisis that eventually led to the intervention of the International Monetary Fund. Emigration surged again after Portugal acceded to the European Economic Community in 1986. Although the economic situation improved in the 1990s, this did not halt emigration; rather, it obscured it, creating the illusion of a structural change that was, in fact, circumstantial.

From the 1980s onwards, new terms were adopted to describe the Portuguese population living abroad, such as "Portuguese communities" — a term reflected in the terminology of government bodies (the secretariat of state[13] and the directorate-general[14]). Additionally, terms like "luso-descendants" and even "diaspora" came into use[15]. Earlier, in 1978, June 10 was decreed as a day dedicated to Portugal, Camões, and the Portuguese communities abroad (Decreto-Lei nº 39-B/78, 1978, art. 1). As we know, terms carry ideological assumptions, and in this case, they serve to "fuel the imagination of a Portuguese nation beyond territorial borders" (da Silva & dos Santos, 2009, p. 127). This led to the extension of the Portuguese expansionist project, giving continuity to the idea of a transnational State and casting Portuguese residents abroad as "ambassadors" for Portugal (Antunes da Cunha, 2009b; dos Santos, 2014). This notion has been reinforced by media content, such as the programme "Portugueses pelo Mundo" (Portuguese Around the World), created by *Rádio e Televisão Portuguesa* in 2010[16].

It is important to note that while the term "Portuguese resident abroad" has been introduced in the fields of law and taxation, the category "emigrant" persists at the administrative and political levels. In recent years, Emigrant Support Offices (*Gabinetes de Apoio ao Emigrante*) and an Emigrant Return Contact Point have been established. Conversely, the Immigration Observatory, created in 2002, has transitioned to the Migration Observatory[17]. This centre produces data and documents related to the "integration of migrants

[13] Its name has changed over time, from *Secretaria de Estado da Emigração e das Comunidades Portugueses* (Secretariat of State for Portuguese Emigration and Communities) to *Secretaria de Estado da Emigração* (Secretariat of State for Emigration), and is currently *Secretaria de Estado das Comunidades Portuguesas* (Secretariat of State for Portuguese Communities). The evolution of the designation can be found at https://www.historico.portugal.gov.pt/pt/o-governo/arquivo-historico.aspx (accessed on September 16, 2024)

[14] From 1980 to 1994, the *Instituto de Apoio à Emigração e* às *Comunidades Portuguesas* (Institute for Supporting Portuguese Emigration and Communities), created by Decree-Law no. 316/80 (Decreto-Lei n.º 316/80, 1980), was in operation. Its extinction gave way to the *Direcção-Geral dos Assuntos Consulares e das Comunidades Portuguesas* (Directorate-General for Consular Affairs and Portuguese Communities), created by Decree-Law no. 53/94 (Decreto-Lei n.º 53/94, 1994).

[15] These changes carry connotations that reflect an ideological continuity in the perception of Portugal: "Portuguese communities" evokes the concept of "a nation spread throughout the world" (Feldman-Bianco, 1992, p. 37), while "Luso-descendants" embodies "the idea of a transnational Portuguese nation" (dos Santos, 2002, p. 19; 2014).

[16] This TV programme "features, in episodes of approximately forty minutes, a collection of portraits of compatriots living abroad. A combination of factors (theme and discursive framework, structure and rhythm of the programme, frequency, time, and place of broadcast) has established this programme as a key reference for the visibility and representation of the Portuguese diaspora in the national media landscape" (Antunes da Cunha, 2017, p. 8). The programme *Portugueses pelo Mundo* is available online at https://www.rtp.pt/play.

[17] This observatory was initially established under the High Commission for Immigration and Ethnic Minorities, which was created in 2002. In 2007, it was rebranded as the High Commission for Immigration and Intercultural Dialogue, and in 2014, it became known as the High Commission for Migration. In 2023, it was renamed the Agency for Integration, Migration, and Asylum.

in Portugal", referring to foreign nationals. Since 2009, the Emigration Observatory (Observatório da Emigração, s.d.) has been "collecting, analysing, and disseminating statistical indicators and other documentary information from various sources regarding emigration and Portuguese communities" (para. 4). The term "migrants" is, thus, used in reference to non-nationals, who are seen as potential contributors to the alleviation of national labour shortages, the sustainability of social security, and the mitigation of demographic ageing. At the same time, the discourse surrounding the "emigrant"[18] continues to be directed towards the "Portuguese" population, implicitly encouraging them to contribute to the country's development through remittances or by becoming "diaspora investors"[19]. There is also an expectation for them to return while still of childbearing age or with their families. In both cases, the issue of ageing remains overlooked, with no acknowledgement that the "young" migrant population will inevitably grow older.

3. A Double Bias: Youth and the Labour Market

The predominant emphasis on the labour market in both scientific research and political discourse[20] overshadows the migration of individuals outside the economic structure, such as children, students, retirees, and others who have exited the labour market due to family or health reasons. This observation is not limited to the national context; Tanja Bastia et al. (2022) note that there are "widespread assumptions that migrants are generally young adults" (p. 1009).

In the literature on Portuguese migration, the perspectives of children and young people, as well as older adults, are frequently overlooked. For instance, what do we know about those who accompany their parents during return migration and who may have only experienced Portugal as a holiday destination? Additionally, what insights do we have into the challenges faced by individuals who have spent a lifetime or several decades abroad and are now relocating to Portugal for retirement? Little or practically nothing. The contributions of these groups to the economic, social, political, and cultural development of the territories they inhabit have yet to be fully explored. The emphasis has been on reclaiming human capital and attracting economic investment, which is a dual message encapsulated in the *Regressar* (Returning) programme. This initiative explicitly aims to draw in individuals of working age while also encouraging investment. Consequently, it has been asserted that "[r]etaining talent from the new generations is Portugal's greatest strategic challenge" (*Reter Talento das Novas Gerações* É *o Maior*

[18] While certain groups with greater cultural and symbolic capital sometimes (self-)identify in alternative ways (often preferring terms like mobility or expatriation), the dominant lexical field remains "emigration/emigrant".

[19] The Council of Ministers Resolution no. 64/2020 (*Resolução do Conselho de Ministros* n.º 64/2020, 2020) established the National Diaspora Investment Support Programme and the Diaspora Investor Status.

[20] Over the past decade, the media has reported a notable emphasis on foreign retirees relocating to Portugal. This focus is linked to the Non-Habitual Resident status, which, until December 2023, provided tax benefits for individuals who settled in Portugal and had a pension from another country. However, discussions surrounding "Portuguese emigration" predominantly centre on youth and the labour market.

Desafio Estratégico de Portugal, 2021)[21]. We are, therefore, witnessing the resurgence of an economic discourse on human capital that is as old as the migratory phenomenon itself. Victor Pereira (2010) highlights that emigration has long been perceived in Portugal as "the loss of precious human capital essential for the progress of the metropolis" (p. 139). He notes that emigration only gained legitimacy from the 19th century onwards, as it aligned with the colonial agenda of population growth: colonisation was presented as a valid alternative to emigration (for further discussion, see M. H. Pereira, 2011).

In the political arena, the most recent attempt to retain "talent" occurred in May 2024, with the announcement by the newly appointed Aliança Democrática (Democratic Alliance, a coalition of right-wing parties) government of a set of measures targeted at young people. "The primary message is to convey to young people that living in Portugal is worthwhile", summarised Prime Minister Luís Montenegro during a press conference, further stating, "we need young Portuguese in Portugal so that we can all have a better future" (Correia, 2024, para. 5).

These speeches and accompanying measures can be seen as performative acts, where the symbolic intent outweighs their tangible impacts, which are perceived as limited. In order to enhance this strategy, various economic stakeholders have been enlisted to contribute to the solution (such as advocating for increased wages and job opportunities for young people). Additionally, the political classifications related to youth have been revised, with the age threshold extended to 35 under the latest *IRS Jovem* (Youth Income Tax) measure. This measure echoes Pierre Bourdieu's assertion (1981/2002) that "classification systems are social products and, as such, are at the centre of a permanent dispute" (p. 92). Indeed, the categorisation of the population (whether by age or other criteria) results from social conventions that change over time. Consequently, an age now regarded as young may have previously been considered old.

4. Ageing and Ageism in Migration Studies

Migration and population ageing have emerged as two significant demographic trends in Europe since the turn of the century. Not only is there a growing number of individuals reaching retirement age, but there has also been an increase in the ageing population engaging in migration (Ciobanu, 2021). This phenomenon is not new; some authors have highlighted the heightened mobility among older segments of the population[22] and their diversity for at least two decades (Warnes et al., 2004). At the international level, the intersection of ageing and migration has proven to be a prolific area of research. However, at the national level, while some studies have emerged over the past decade

[21] Quote from Prime Minister António Costa at a congress in 2021, where he acknowledged that Portugal has "a significant social issue for the future, characterised by individuals being overqualified for their current jobs while also being underpaid, leading to frustration and an increased risk of encouraging emigration" (*Reter Talento das Novas Gerações É o Maior Desafio Estratégico de Portugal*, 2021, para. 9).

[22] In the research field of migration and ageing, there is no single age threshold to define an "older migrant". While some studies consider individuals over the age of 50-55, others adhere to the age of 65, which is the standard retirement age in many countries. This classification facilitates international statistical comparisons. However, this delineation is debatable, particularly due to the "growing gap between retirement age and old age" (Fernandes, 2016, p. 32).

(Azevedo, 2022, 2023; Machado, 2012; Machado & Roldão, 2010; Marques & Ciobanu, 2012; Sampaio, 2017), this nexus still represents an emerging line of research. Thus, it is possible to conclude that the intersection of migration and ageing requires greater focus in Portugal, both from scholars and policymakers. Firstly, the ageing population whose life courses are shaped by international migration or mobility, present or past, is on the rise. Secondly, this population group has different needs compared to younger individuals and poses unique challenges for public policies, particularly regarding infrastructure and social services. Thirdly, they possess resources (not just economic) that can contribute to the development of the areas where they reside while also exacerbating intra- and inter-territorial inequalities.

In another paper, I highlighted how the migration of individuals over 65 has contributed to accelerating demographic ageing in Portugal over the past decade[23]. This is due to the combined effect of the immigration of foreign retirees drawn by tax incentives (such as the Non-Habitual Resident status) and of Portuguese retirees from abroad who have properties and family ties in Portugal (Azevedo, 2022).

In a country where the population over 65 is increasing in demographic significance[24], it is essential to pay more attention to this population group, which includes both nationals and non-nationals, and whose mobility patterns are diverse and fluid. An approach to mobilities from the angle of retirement (such as the one proposed by Nedelcu et al., 2023) enables a multi-layered perspective and the analysis of age-related (im)mobility practices, as well as transnational practices of older individuals, whether they are migrants or non-migrants. In fact, even those who do not migrate engage in transnational mobility practices, often to provide support or visit their descendants living abroad. This theoretical-methodological proposal adopts a multicentric analytical lens that acknowledges the complexity of transnational mobilities intertwined with intricate family configurations, encompassing the movements of both those who leave and those who stay, whether through physical mobility or technologically mediated interactions.

By frequently travelling on air routes to destinations with significant Portuguese populations, such as Geneva or Luxembourg, we can observe the diverse profiles of people over 60 travelling to and from Portugal and how their mobility is interwoven with earlier migrations, either undertaken by themselves or by close family members. It is essential to highlight the interdependence between migration and mobility, which can be viewed as two sides of the same nexus (Piccoli et al., 2024). This relational perspective helps us understand how various transnational movements intersect and shape one another while also allowing for an examination of the normative assumptions that underlie certain categories in migration studies. An especially interesting aspect is the potential to

[23] According to data from the Census run by the *Instituto Nacional de Estatística* (Statistics Portugal), Portugal had a ratio of 102 elderly individuals for every 100 young people in 2001, 128 in 2011, and 182 in 2021, making it the country with the third highest ageing rate in the world. To establish the population ageing index, the *Instituto Nacional de Estatística* compares individuals aged 65 and over with those aged 0 to 14. It is important to note that the age limits for calculating this indicator remained unchanged between 2001 and 2021.

[24] According to the latest census data, individuals aged over 65 accounted for 23.4 per cent of the population in Portugal in 2021 (Instituto Nacional de Estatística, 2022).

expand the focus of migration studies to include non-migrants who, due to various factors, including age, become mobile. This is the case, for example, of grandmothers who remain in their country of origin and develop mobility practices when grandchildren are born in a migratory context, as well as the descendants of migrants who spend their annual family holidays in Portugal.

The limited attention and debate surrounding the transnational mobility of older people can be attributed, in particular, to the central focus on labour market issues and youth. The (scarce) academic interest in the migration and mobility of individuals who are retired or close to retirement in Portugal has not kept pace with the trends being observed[25].

Some argue that ageism exists within the social sciences, referring to a bias against "age" (Thouez, 2010). This author highlights trends such as the homogenisation of traits within a given age group. Taking the example of the "60 and over" category, Thouez (2010) stresses that this practice masks the significant diversity among individuals in this group, which becomes particularly problematic when research findings are used to inform public policies. The specialised literature often distinguishes between the "young-old" and the "old-old", typically setting the boundary at 80 years. However, others differentiate between "old, old-old, and oldest old", using the age brackets of 75, 85, and 95 to form these subcategories (Cohen-Mansfield et al., 2013). Ultimately, the concepts of age, old age, and youth are socially, institutionally, and statistically constructed, meaning the line between youth and old age is not fixed (Bourdieu, 1981/2002).

5. Life Course: Toward a More Nuanced Understanding of Migration

The life course perspective remains underutilised in migration studies (Wingens et al., 2011) despite its significant heuristic potential. It offers a more nuanced analysis of migratory processes and experiences while also challenging certain established categories. Take, for example, the concepts of "first" and "second" generation migrants. These are often assumed to be straightforward classifications, but in reality, their definitions vary by country and socio-historical context. Thus, the category "second generation" may refer exclusively to those born in the destination country (Gaspar, 2018). Still, it can also apply to children who arrived and were educated there before a certain age (Chimienti et al., 2021). The complexity deepens when we encounter multiple "first" and "second" generations, distinguished by both birth cohort and the stage of life in which they migrated. The variation within these categories is vast, making it essential to situate each migration historically to avoid working with seemingly homogeneous but actually diverse groups. Migrating to a

[25] Eurostat data (for the period between 2010 and 2015) analysed by Ciobanu et al. (2016) shows a significant increase in the number of foreign-born residents aged 55 and over in most European countries, with a 72% rise in Portugal. The annual reports of the Foreigners and Borders Service (Serviço de Estrangeiros e Fronteiras, s.d.) support this data, indicating that the foreign resident population in Portugal aged 65 and over more than doubled: from 4.1% in 2010 to 9.5% in 2020. This growth is partly attributed to an increase in pensioners choosing to settle in Portugal after retirement (Azevedo, 2022). Consequently, when considering the population over 60, Portugal stands out as one of the main receiving countries in Europe, for both foreign and national citizens. According to Switzerland's statistical office (OFS, 2024), Portugal became the leading European destination (in relative terms) for people 65+ who left Switzerland in 2023. The same report also notes an increase in the emigration of Portuguese nationals over the age of 65.

specific country at the ages of 25 or 40 in 1970, 1990, or 2010 entails entirely different migratory experiences and distinct socio-economic and political contexts of both departure and arrival. Similarly, being a descendant of Portuguese migrants and being born in that same country in 1970, 1990, or 2010 may involve comparable experiences in terms of social categorisation (due to their migratory origin); however, they also represent distinct experiences and trajectories.

The category "generation" alone cannot adequately capture the individual and family trajectories made up of multiple migratory movements. To illustrate this point, consider the case of Isabel, an example drawn from multiple cases encountered during fieldwork: Isabel's[26] grandparents migrated to France in 1965, where her mother, Ana, was born shortly after. In the late 1970s, the family returned to Portugal, but Ana migrated again a decade later, this time to Switzerland, where her husband, Mário, was a seasonal worker. Isabel was born in Switzerland in 1990. Ana and Mário decided to return to Portugal when Isabel finished primary school. After completing her degree and facing high unemployment in 2012, Isabel moved to Luxembourg, where she still resides today. So, to which generation does Isabel belong? The answer is not straightforward and varies based on the (national) perspective taken.

The term "generation" is also employed to describe migratory flows occurring in different periods. For instance, "first generation" sometimes refers to adults who decided to migrate themselves (in contrast to the "second generation", children who do not choose to live in a country other than that of their nationality of origin), and sometimes to refer to those who left Portugal several decades ago, alluding to earlier migration flows (opposing "old migration" to "new migration").

The life-course perspective introduces a temporal dimension that enhances our understanding of migratory dynamics and the diversity of profiles and trajectories encompassed by the term "Portuguese emigrants". Similarly, by examining the interplay between biological (individual and family) and historical times (Hareven, 1994), this perspective sheds light on certain tensions and disagreements that arise in traditional destinations between individuals from earlier and more recent migratory flows. João Teixeira Lopes (2014) highlights several examples of these tensions in his study on "qualified emigration to France" conducted at the beginning of the last decade. Understanding why "older people often referred to the new emigrants as 'different people', 'addicted to the computer', 'who don't integrate into associative life', 'who don't want to work,' and who 'are damaging the good image of the Portuguese in France'" (p. 5) requires situating the migration experiences of both groups within their respective biographies[27], as well as considering the socio-political contexts at origin and destination. In other words, beyond classic variables — such as age and education — it is crucial to incorporate the

[26] Fictitious names.

[27] This concept was previously articulated by Everett Lee (1966), who, in his seminal article on migration theories, emphasised the significance of "stages of the life cycle" as an explanatory factor.

theoretical principles of the life course (Elder Jr., 1994; Elder Jr. et al., 2003)[28], including the *timing* of their lives (when they migrated) and the *historical time* and *place* (when and where they were socialised, transitioned into adulthood, or arrived in a specific country or location).

Integrating these elements provides a clearer understanding of why Portuguese individuals residing in the same territory within a destination country may never cross paths. Successive migration flows from the same country (in this case, Portugal) are increasingly marked by significant heterogeneity. Sharing nationality and language does not suffice to foster conviviality, mutual assistance, or a sense of belonging to the same group. Consequently, the term "Portuguese community(ies)" is scientifically inoperative. Nonetheless, it is often employed in political and media discussions regarding Portuguese citizens living abroad[29]. Its use as a category of practice ultimately reinforces the notion of "a Portuguese nation dispersed around the globe" (Feldman-Bianco, 1992, p. 37).

The temporal dimension, examined across various scales, is essential for understanding migratory dynamics. By adopting a longitudinal perspective on migration, the life-course framework allows for a detailed exploration of the complexities of individual and family trajectories. This contrasts with studies that assess individuals at a specific moment, which may limit their analysis to characteristics pertinent only at that time. The longitudinal perspective also facilitates the observation of spatiotemporal variations in a person's life and those around them (following the principle of "linked lives"[30]) while accounting for the shifts between periods of mobility and immobility, in the objectives and temporalities of migration projects, and fluctuations in the intensity of transnational practices and mobilities. Factors such as professional integration in the country of residence, family circumstances, or health status are variables that evolve over time and alter life projects and mobility intentions and practices. In essence, transitions that mark personal, familial, and professional life—such as births, deaths, marriages, divorces, unemployment, and retirement — are particularly significant for understanding both international and internal mobilities and migration, whether of migrants themselves or those connected to them.

Finally, consider the case of retirement return migration, often viewed as a straightforward phenomenon where individuals return to their country of origin to enjoy the final phase of life after leaving the workforce. However, some individuals return to Portugal upon retirement without having planned to do so in the years leading up to their exit

[28] Glen Elder emerged as a pioneer in life course studies, laying out the theoretical principles of this framework. He drew inspiration from various works, particularly the seminal research by W. I. Thomas and F. Znaniecki, published between 1918 and 1920 (The Polish Peasant in Europe and America). This work introduced dimensions that have become central to life course theorisation, such as the idea of life history and the exploration of migratory experiences through the life cycles of different family members from an intergenerational perspective.

[29] Examples include the Diplomatic Portal, which states that "the Portuguese community in France is the largest of the Portuguese communities in Europe and one of the major foreign communities established in that country" (Embaixada de Portugal em França, n.d.); and news articles, such as: "between 'hope' and 'concern', the Portuguese community in Venezuela is also waiting for the outcome of the elections" (Vásquez, 2024).

[30] For further insights into this fundamental principle of the life course, refer to Elder Jr. (1994).

from the job market, even if it was their initial intention when they first migrated. The interplay of individual and social factors can create unexpected turns in their migratory plans. There may be unsuccessful attempts to return, or a decision to abandon the idea of a permanent return due to family or health reasons, or a reconfiguration of identity, for example. The life course perspective highlights that this is a more intricate phenomenon than it appears at first glance (Azevedo, 2023). Reflecting on biographical and familial timelines, as well as socio-historical and political contexts, allows for a more nuanced understanding of the factors driving retirement migration. Thus, to grasp the subtleties of decision-making processes, it is essential to consider the evolution of each person's unique circumstances. Recognising that the past influences the present, comprehending an individual or couple's current situation requires also understanding their prior slife stages.

6. Gender: An Essential Analytical Approach for Understanding Migratory Experiences

For decades, men were viewed as the universal reference in migration studies — the primary economic agents who migrated alone — which rendered migrant women invisible. However, from the 1970s to the 1990s, women's, gender, and feminist studies gained prominence and began to reshape this narrative. Mirjana Morokvašić's (1984) seminal article, "Birds of Passage Are Also Women", shed light on the gender bias in migration research. Progressively, studies have demonstrated that women are not merely followers or dependents in family reunification processes; they also migrate alone, engage in economic and transnational activities, and play an active role in family migration projects, fulfilling significant social and economic functions even while remaining in their countries of origin. The pioneering research of Caroline Brettell (1978) and Karin Wall (1984) shows that women "hardly correspond to the prevailing representations we have of Portuguese emigration and its history: a masculine adventure" (p. 62).

The feminisation of Portuguese migratory flows is not a recent phenomenon, as illustrated by Gérald Bloncourt's photographs in the suburbs of Paris[31], the narratives of those who migrated to Europe in the latter half of the 20th century, and certain statistics. For instance, statistical data from Switzerland indicates a significant female presence within the Portuguese population in that country (Azevedo, 2023; Marques, 2008). However, this feminisation and its implications for gender relations — such as the renegotiation of gender roles within families in a migratory context — have received limited scholarly attention. Notably, Maria Engrácia Leandro et al. (2008) conclude that the migratory context offers Portuguese women, namely those who have moved to France and Germany, a "possible space for realising aspirations related to personal and family autonomy and the reconfiguration of family tasks and roles" (p. 32). This finding aligns

[31] Refer to the section "*Diaporama: Sur les Traces de l'Immigration Portugaise*" on the website of the *Musée de l'Histoire de l'Immigration* (https://www.histoire-immigration.fr/pour-une-vie-meilleure-photographies-de-gerald-bloncourt, retrieved at May 28, 2024).

with observations in other contexts: a change of country prompts an adjustment of social positions, affecting not only gender but also class and race. Thus, an intersectional perspective is essential for uncovering power relations (Miranda, 2018).

Gradually, scholars "recognise and treat migration as a gendered process" (Christou, 2003, p. 1), and consequently, "a gender analysis is necessary for interpreting migrants' experiences" (Zontini, 2015, p. 331). There is now a consensus that gender impacts not only the decision to migrate but also the processes and pathways of economic, social, political, and cultural integration abroad, as well as the decision to return and the experience of reintegration in the country of origin.

However, despite its significance as a category of analysis for understanding the asymmetries in migrants' life course, gender is frequently stripped of its analytical potential, often reduced to a mere variable and misused as a synonym for "sex". This issue arises from the adoption of the term "gender" by social scientists who lack familiarity with feminist theoretical literature, leading to the deproblematisation of gender (Pereira, 2023). This tendency leads to a problematic way of approaching social phenomena, as it accentuates *inter*-group differences while neglecting *intra*-group variations, thereby contributing to a polarised analysis (men vs women) and perpetuating hegemonic gender structures. Consequently, it is not unusual for the stereotype "*men* this, *women* that" to prevail in migration studies. Nonetheless, scholars who employ a more nuanced analysis of gender in migration highlight that gender alone is not a sufficient explanatory variable, as it intersects with other variables. In the context of return migration, it is possible to observe that in some circumstances, it is the woman who does not wish to return, while in others, it is the man (Monteiro, 1994).

While the idea that gender differences shape migration processes and that structural limitations and individual choices vary between women and men is well established in the literature, adopting a gender analysis requires moving beyond a simplistic binary framework of women/men. This entails, first, acknowledging that gender is socially constructed and spatiotemporal situated; second, recognising that gender is not merely an individual trait but a social structure; and third, adopting a critical and relational perspective on femininity and masculinity. Moreover, a thorough examination of migration processes should avoid "treating gender analysis as merely identifying differences between women and men", as this "tends to *overstate the internal homogeneity* of each category" (Pereira, 2023, p. 4). It is imperative to explore the differences within each category alongside the similarities between them. Additionally, it is crucial to examine how gender intersects with other axes of inequality, such as class, ethnicity, disability, and more, as feminist academics have advocated (Crenshaw, 1991).

7. Post-Colonial Perspectives: The Implications for the Representation of the Portuguese Migrant Population

Another blind spot that warrants closer attention is the intersection between "Portuguese emigration" studies and (post-)colonial studies. Portugal's reluctance to

acknowledge that part of its population is racialised (Alves, 2021) leads to the assumption that "Portuguese emigration" consists predominantly of white, catholic individuals from Portugal[32]. In fact, studies on Portuguese migration often neglect important variables such as ethnicity, religion, and the migratory histories of families who left the country.

While studies focusing on the "immigrant" population in Portugal acknowledge the ethnic-racial dimension and explore how racial categories shape social interactions and create various hierarchies and forms of discrimination (Góis et al., 2022), this consideration is often absent in research on the "emigrant" population. An ethnographic approach, however, can uncover the diversity within the Portuguese population living abroad through a dialectical analysis of social structures, fostering greater reflexivity in the research process. A micro-analytical perspective reveals that this heterogeneous population comprises individuals born in Portugal, those born in the destination country, and individuals coming from another European country or another continent who have acquired Portuguese nationality either by previously migrating to Portugal and undergoing naturalisation or through an ancestor with Portuguese nationality up to the second degree in a direct line (Lei n.º 37/81, 1981).

Despite this, the research conducted to date, both in Portugal and in the destination countries, has failed to reveal the heterogeneity within the outflows from Portugal. This limitation is partly due to the so-called "Lusophone migratory system" (Baganha, 2009), which is rooted in the colonial past that "binds" Portugal to Portuguese-speaking African countries, Brazil, India, East Timor, and Macau.

Research conducted by Rita Cachado (2014) and Ambra Formenti (2023) in the United Kingdom, focusing on Portuguese families of Hindu-Gujarati and Guinean origin, respectively, illustrates how, over the past two decades — especially in the wake of the 2008 financial crisis — migratory flows from Portugal have increasingly encompassed individuals from prior migratory flows to Portugal. Additionally, Bernardino Tavares and Aleida Vieira (2023) highlight how, in Luxembourg, coloniality persists among migrants coming from Portugal. While the Portuguese language serves as a common bond, their interactions are influenced by a colonial legacy that perpetuates hierarchies and power dynamics.

During my fieldwork in Switzerland, I also observed the presence of Portuguese people from diverse origins, such as Cape Verdean, Guinean, Angolan, Brazilian, and Indian. While they share the same nationality and language and formally possess equal status and rights, they experience different processes of racialisation. For instance, an individual's phenotype and features, such as skin tone, hair colour, or height, can determine whether they are or are not associated with a migrant origin (European, non-European, Southern European, Eastern European, or Northern European). As a result, some individuals are instantly identified as Portuguese, while others go unnoticed

[32] The assumption that Portugal is a white, European, and Christian nation has faced criticism in research concerning public spaces and Portuguese school textbooks. These studies reveal how textual discourse and imagery reify hegemonic beliefs rooted in colonialism (e.g., Almeida, 2021; Araújo, 2015; Cabecinhas, 2023).

(and are assumed to be nationals) or are categorised as extra-European despite not being so.

Thus, the ethnic-racial dimension functions as both a marker of difference and a generator of inequalities in migratory contexts. This often prompts individuals to reframe their identities, with some choosing to prioritise their African identity over their Portuguese one while still maintaining connections and a sense of belonging to Portugal. This dynamic reflects a colonial legacy that continues to link *Portuguese identity* with whiteness in collective imaginaries — both in Portugal and in Switzerland.

It would be beneficial for migration studies to become more closely intertwined with post-colonial and decolonial studies. At the intersection of these perspectives, we can gain a more critical and reflective understanding of Portugal as simultaneously a country that sends and receives migrants, not just in recent years but over the centuries, as African studies have shown, revealing a significant African presence in Lisbon as early as the 16th century (Henriques, 2009). This also allows us to adopt a more critical lens in examining how, as researchers embedded in the structures of former colonial empires, we produce and disseminate knowledge. By questioning our scientific practices, we could contribute to "decolonising knowledge" in the social sciences (Connell, 2024), potentially offering new and productive heuristic approaches to migration studies.

8. Final Considerations: Once a (E)Migrant, Always a (E)Migrant?

This reflexive article aimed to raise questions that could contribute to a critical discussion on what is conventionally termed "Portuguese emigration". There are undoubtedly many others. In this paper, I sought to examine some of the concepts I came across during my research over the past six years and to consider the relevance of certain analytical perspectives in addressing some of the current blind spots in migration literature produced in Portugal. I have aimed to highlight the limitations of overly rigid categories that fail to account for contemporary circulation patterns, as well as the fluidity that characterises the lives of people with migratory experiences and/or origins. Before concluding with a final call for greater reflexivity in our practices and discourses — echoing Sayad's (1999) epigraph suggestion of treating the discourse about the object as an object of study — I wish to raise one final question, bringing us back to the initial issue about the relevance of the term "emigrant".

How many years of settling in another country does it take for someone to be no longer labelled a "(e)migrant"? What degree of integration is necessary before one is seen as *local* rather than as an *outsider*? Where does the line between "migrant" and "citizen" lie?

I recall a 60-year-old Portuguese man who has lived in Switzerland since 1985, expressing frustration at being systematically consigned to a sense of otherness in both countries. Despite holding dual citizenship, he feels like a perpetual "foreigner". In one country, his accent and typically Portuguese name mark him as a "migrant". In the other

country, his long absence often prompts remarks like, "look, there comes the Swiss"! Similarly, young Portuguese people educated in the destination country can face "migranticisation" (Dahinden & Korteweg, 2022)[33] due to their surname or phenotype or even being labelled "second generation". However, when their external traits are not associated with another geography, their origins may go unnoticed, as they have mastered local cultural codes and are not distinguishable by their way of speaking. As a result, their multiple identities can be rendered invisible through a process of "citizenisation" (Dahinden & Anderson, 2021, p. 39).

Consequently, the status of "(e)migrant" is a social construct in which various actors, including social scientists, play a role. Acknowledging the constructed nature of both the "(e)migrant" and "citizen" categories does not imply that we should abandon them, as they remain significant at both normative and legal levels, as well as in terms of individual subjectivities (Anderson, 2019). This observation is in line with the distinction made by Rogers Brubaker (2013) between categories of analysis (used in research) and categories of practice (used in everyday language and political discourse).

In conclusion, drawing on the insights of these authors, I advocate for a reflexive approach to the use of these categories in sociological research. This is essential to avoid the uncritical reproduction of categorisation processes that align with nation-state logic, which is often perceived as natural. Indeed, criticism of methodological nationalism has gained significant traction in this century (Amelina & Faist, 2012; Wimmer & Glick Schiller, 2002). Ultimately, this perspective entails not presupposing distinctions between migrants and non-migrants, nationals and non-nationals from the outset, but rather examining how these categories are created and reflecting on the processes involved in knowledge production.

Translation: Anabela Delgado

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[33] These authors draw an analytical distinction between migranticisation and racialisation. They define the former as a process of "foreignisation" rooted in the logic of the nation-state. However, they acknowledge that, at times, both processes may overlap.

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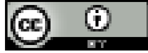

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