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Chapter 5. Global contexts of rural ageing: Informing Critical Human Ecology Theory

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Abstract

The relevance of global contexts in shaping the experiences of older people living in rural areas has been inadequately explored, theoretically and empirically. The purpose of this chapter is to address this theoretical gap through incorporating global environments into existing Critical Human Ecology Theory and illustrating their relevance through case studies from countries in diverse world regions: Malawi, India, Mexico and Israel. The addition of theoretical constructs from social exclusion and life course theories of cumulative advantage/disadvantage of rural individuals places rural ageing as processes of change over time in rural people and communities and demonstrates the differential impact of global influences on local areas.

Commented [AC1]: A note from co-editors Mark, Rachel and Kieran:

Thank you for providing us with a revised second draft of your chapter and for addressing the comments provided by the co-editors. At this time, we do not have any further suggested revisions.

We have made editorial and formatting edits, and have cross-referenced other chapters from this volume throughout your chapter.

Please contact Mark (markskinner@trentu.ca) to discuss any questions you may have regarding your chapter.

Introduction

The mission of the UN Sustainable Development Goals is bold and inclusive. In endorsing its principles, UN Member States pledged to ensure “no one will be left behind” and to “endeavour to reach the furthest behind first” (UNDP 2018, p. 3). The goals have a social justice agenda, aimed at reducing disparities within and across world regions (see Burholt and Scharf, chapter 6 in this volume for further articulation of the social justice agenda).

Older persons are one of the groups that has received global attention. Contexts that address their status and potential vulnerabilities have been the subject of major reports by U.N. agencies that emphasise that risks of older people being left behind are influenced by their social, physical and policy settings (World Health Organization 2015). Rural residents are seen as especially vulnerable as a result of the places in which they live that may leave them “isolated, without access to their immediate families or to social and other types of infrastructure” (UNECE 2017).

Given their international remit, it seems surprising that global NGOs have not highlighted the powerful influence of global contexts such as climate change (see Carroll and Walker, chapter 8 in this volume), political instability and pandemics that go beyond political borders and may shape the experiences of older people in ways that we don’t yet fully understand. It’s time to take up the challenge of understanding “how diverse rural older adults become empowered or disempowered within certain contexts” (Skinner & Winterton 2018, p. 16). In our view, despite considerable theorizing and empirical examination of rural ageing, we have not adequately considered the contemporary relevance of global contexts in shaping experiences and processes of rural aging.

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The purpose of this chapter is to address this theoretical gap through:

1. incorporating global contexts into Critical Human Ecology Theory, considering how macro contexts create constraints and opportunities in the lives of older people.
2. grounding this global theorising with case examples from Malawi, India, Mexico and Israel, that illustrate the immense diversity in rural communities and their older residents.
3. reconsidering key assumptions of Critical Human Ecology Theory in light of the incorporation of global contexts of rural ageing.
4. proposing theoretical challenges to frame the next decade of rural ageing studies.

By incorporating global contexts into Critical Human Ecology theory, we illustrate how such contexts provide constraints (and a few opportunities) for rural people and settings. We believe that the increasing global perspective of ageing and engagement with international contexts requires such theoretical work as a basis for providing evidence of the importance of contexts in framing the lives of older people.

Critical Human Ecology Theory: Incorporating the Global

Critical Human Ecology (Keating & Phillips 2008) is a contextual framework that theorises near environments as the key contexts of rural ageing. Informed by Human Ecology and Environmental Gerontology traditions, the most relevant elements of near environments for older rural residents are physical (including built environments of home and community) and interpersonal (networks of family members, friends and neighbours). Interactions with physical

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and social aspects of peoples' immediate surroundings are emphasised (Keating & Phillips 2008). The framework draws on critical theory, interrogating assumptions about rural areas as good places to grow old.

Global statements about contexts of rural ageing, suggest that we must broaden our ecological theorising, turning to macro environments as we have done so well and for so long with the near environments of rural communities and people. We can no longer ignore global contexts of uncertainty and unpredictability, climate change, political instability and mass migration. Rather, we must better understand these macro environments and how they intersect with and influence rural places and people. Examining global contexts of rural ageing will indeed help us better understand ageing in rural places (Skinner & Winterton 2018) and the extent to which contemporary global contexts may marginalise and exclude.

Case examples of rural ageing

Theorising global contexts of rural ageing is in its infancy, in part because our theoretical understandings and empirical knowledge are based largely in high income countries in Europe, North America and Asia-Oceania. Yet, a key assumption of Critical Human Ecology is that understanding diverse experiences of ageing requires explicit consideration of ageing in various contexts (Keating & Phillips 2008). We address the admonition to broaden our contextual remit, grounding this discussion of global contexts within case examples from Malawi, India, Mexico and Israel. They represent different world regions. They also reflect that range of income groups designated by the World Bank List of Economies (World Bank Data Team 2018) in which gross

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national yearly income (GNI) per capita is calculated. These are: low income (\$995 or less, Malawi); lower middle income (\$996 to \$3,895, India); upper middle income (\$3,896 to \$12,055, Mexico); and high income (\$12,056 or more, Israel). Importantly, they illustrate how different components of global contexts shape lives, often, but not always, in ways that leave older people behind. The case examples, presented in the next section of the chapter, are written by people who live in the countries they describe and who are social science and health professionals. Each was invited to write a short statement about older rural people in their country that illustrates broad contexts of rural ageing.

[Insert Malawi case study description here]

Rural Malawi: Grandfathers raising orphaned grandchildren

Malawi is one of the least developed countries in the world. It is largely rural, with an economy based in agriculture (World Population Review 2019). It is heavily reliant on international aid. Mayeso Lazaro writes of a group of older rural residents of Malawi who have been rendered invisible by global and national contexts that contribute to their marginalization. They are older men who are raising grandchildren in the wake of the continuing HIV/AIDS epidemic that has left 12% of children in the country without parents. They are taking on unexpected family care in a setting in which families are the assumed source of support but grandfathers are not seen as primary or even suitable caregivers. They are marginalised because of gender stereotypes that position them as undeserving of the limited amount of financial support for grandparent care.

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They are further marginalised because of the precariousness of international aid and widespread corruption in its distribution. Few receive any financial assistance.

The difficulties experienced by the Malawi grandfathers illustrate influences of global contexts on older rural residents. Hyde and Higgs (2016, p. 40) describe these influences as different “spatial logics” whose relations may continually shift but that must both be taken into account. The term ‘glocal’ has been coined to describe these contextual relationships in which global trends “pass through the local like light passing through glass”, changing the local and reflecting back on the global (Roudometof 2015, p. 403).

The rather poetic use of refraction of light seems in stark contrast to the devastating influence of the HIV/AIDS pandemic on local communities and on the family lives of those who survive.

There has been much research on the HIV/AIDS epidemic in response to a global public health crisis. Much less is known about how the lives of older persons are changed. On the global stage the plight of grandmothers raising grandchildren has been reflected back through NGOs (see, for example: <https://stephenlewisfoundation.org/get-involved/grandmothers-campaign>).

Grandfathers remain invisible. Do such global reflections and invisibilities provide opportunities for rural researchers to see ‘the local’ in new ways and to advance theorising of global-local interfaces? Do we need to incorporate gender more explicitly into our rural ageing research?

[Insert India case study description here]

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Thar Desert, India: climate and deep exclusion

In his description of the Thar Desert in India, Prakash Tyagi provides a picture of the powerful impact of climate on older people. We see a harsh rural setting in which frequent crop failures due to drought have a cascading effect, resulting in livelihood failures and food and water insecurity. These in turn are associated with a ‘double burden’ of disease, exacerbated by the inability to access health services. Lack of literacy and family neglect mean that older persons, especially women, are vulnerable and have little agency. In this place where the marker of entry into old age is 55 (P Tyagi 2019, pers. comm. 23 September), there is deep exclusion (Walsh, Scharf & Keating 2017). We know little about how climate change might be creating an even more dire situation for older people in the desert.

In this case example, little of the global impact of climate on local communities is reflected back. Researchers have begun to document the disproportionate impact of natural disasters such as earthquakes and tsunamis on the lives of older persons (Burholt & Dobbs 2012; Labra, Maltais & Gingras-Lacroix 2018). Global climate disasters are similar to pandemics—they are dramatic events that capture world attention. The difference with the example of the Thar Desert is the stable and pervasive exclusion of older people. There is nothing dramatic and so we do not see—an invisibility that surely is the hallmark of deep exclusion.

As rural researchers and ecological theorists, engaging with unfamiliar contexts can prompt us to challenge our critical thinking about the near environments that have long been the focus of our work. If we ‘see’ the Thar desert, might we rethink ageing in place when food and water

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insecurity are endemic; or family support in settings of widespread abuse and neglect of older women within their families. Might we then really, critically, undertake the challenge raised by the editors of this volume to better understanding “how diverse rural older adults become empowered or disempowered within certain contexts” (Skinner & Winterton 2018, p. 16)?

[Insert Mexico case study description here]

Rural Mexico: International migration and well-being of older people

In their discussion of rural ageing in Mexico, Patricia Rea Angeles and Veronica Montes de Oca also describe a setting of poverty among older rural people where livelihoods based in agriculture are increasingly uncertain. What makes Mexico unique among the case countries illustrated in this chapter is that global contexts have long been a part of the national consciousness.

For more than 70 years, people have left rural areas of Mexico and migrated to the United States. They leave for economic opportunities and to escape the violence and instability associated with drug trafficking. The remittances they send home serve as a buffer against low and uncertain income as they do in many receiving countries (Adams & Page 2005). Yet just at a time when the stability provided by remittances is increasingly important to older rural residents, the flow of people and of resources has been halted. Abrupt changes in U.S. immigration policy mean that Mexican migrants are being barred or expelled from U.S. residence. Global contexts of migration policy and international movement of illegal drugs frustrate governments and disrupt lives

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(Durán-Martínez 2017; Slack 2019). We know little about how the return of migrants to their home communities affects those communities or the social connections across generations in their families. Global politics have built a wall against global opportunities.

[Insert Israel case study description here]

Israel Kibbutz: global ideological shifts

Liat Ayalon's narrative of the transformation of philosophy of the kibbutzim in Israel bears striking resemblance to global ideological shifts toward neoliberalism. Kibbutzim were established in the early 20th century based on a philosophy of equality of production and consumption, values that are often associated with rural communities (Keating, Swindle & Fletcher 2011). However, as Ayalon notes, both rural living and such rural values have all but disappeared. Of the few remaining kibbutzim, only about 25% are still communal. Most have been privatised, emphasising markets as the organising feature of political, economic and social arrangements (Springer, Birch & MacLeavy 2016).

How have older people fared in this transition? Political theorists and gerontologists argue that a feature of neoliberalism is the individualisation of risk (Hamilton 2014), often associated with older people who have little agency in the face of such global changes. However, there is an indication that older people who have remained in the kibbutz fare well as owners of desirable properties with a strong sense of belonging. They may be exemplars of those who are the

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advantaged in what Rubinstein and de Medeiros (2015) have described as a two-class system of those who age ‘successfully’ and those who do not.

The dominant global narrative about those who remain in rural communities that are experiencing out-migration is that they are ‘left behind’, a phrase that is often associated with deprivation, isolation and advanced age (Antman 2010; Zhong et al. 2017). Yet for these older people it seems plausible that rather than being ‘left behind’, they have ‘stayed behind’ enjoying the benefits of the culture of sharing and supportiveness that were fundamental to the establishment of the kibbutzim and those of the market economy that have contributed to their economic well-being.

Updating key assumptions from Critical Human Ecology Theory

Critical Human Ecology Theory was developed to draw together theoretical work from Environmental Gerontology and Human Ecology on important contexts in the lives of older persons and from Critical Theory that stresses the need to challenge discourses that foster inequities (Keating & Phillips 2008). In our view, theories must be developed, applied and revised in an ongoing process that keeps them fresh, relevant and useful. In this final section of the chapter, we revisit four assumptions of Critical Human Ecology Theory that need to be reconsidered in light of the addition of global contexts and global settings, discussing revisions and challenges for rural ageing research.

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Boundaries between environments are permeable so that characteristics of one environment interact with and influence others (Keating & Phillips 2008).

The lens of rural ageing research has been on physical and social environments that comprise rural communities. Thus our theorising has been about the ideal interfaces between the resources of older rural residents and those of their communities (Keating, Eales & Phillips 2013). The addition of global contexts requires that we rethink the influences of contexts on each other. Our case examples suggest that for the most part, global contexts have a powerful and often negative influence on local contexts. Pandemics, climate change and isolationist policies of other governments restrict lives.

We propose the following revised assumption: *Environments interact with and influence each other. Macro global contexts have a differential impact on other contexts, shaping local places and local lives.*

People have varying capacities to make choices and to act upon or adapt their environment (Keating & Phillips 2008)

‘Varying capacities to act’ seems in hindsight a rather naive first-world assumption given the immensely difficult lives of older people described in most of the case examples. Do we risk deepening the exclusion of those who have little agency by assuming capability in the face of the profound inequities they experience? Does thinking globally create a conceptual imperative to

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think about where responsibility lies for supporting those who have limited ability to adapt their environments?

We hold different actors responsible for providing such support. UN reports place the onus on governments to leave no one behind by reducing widening inequalities in income, health status and access to services. Yet governments increasingly demur, placing the onus on communities to foster supportive environments. Winterton et al. (2016, p. 321) provide an example. They state that “policy discourses promote the economic and health-related benefits of older adults aging in community settings rather than in residential care, place considerable responsibility on communities to foster supportive environments.” Neoliberal discourses of individualization of risk further shift responsibility to older persons themselves through narratives of empowerment and successful and unsuccessful ageing. We must be vigilant in the face of what Mégret (2011, p. 47) describes as the power/vulnerability paradox which positions older people as affluent and powerful as well as isolated and vulnerable. He argues that this paradox “structures society’s very ambivalent rapport to its elderly class”. Thus we propose the following revised assumption:

People have varying capacities to make choices and to act upon or adapt their environments.

There must be shared responsibility for supporting those with limited agency.

Critical Human Ecology challenges the homogeneity of older persons (Keating & Phillips 2008).

We have not undertaken a systematic consideration of elements of homogeneity that we need to challenge. In the case examples we are reminded of age diversity (Malawi grandfathers ranged from 54 to 92); and of age disadvantage (in the harsh Thar Desert, the marker of entry into old

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age is 50). Gender diversity is evident though not always so. Women's suffering in the Thar Desert is disproportionate to that of men; in contrast, men are rendered invisible in Malawi. Are there similarly gendered experiences in who benefits more from land as commodity on kibbutzim or from remittances sent home to older people who remain behind in rural Mexico?

Importantly the immense diversity in rural settings also challenges us to address the question of whether rural itself remains distinctive. If low population density is a rural hallmark, how do we think of the Thar Desert that has millions of people but is designated rural because it is more sparsely populated than other parts of India? What is a rural community or rural people where boundaries are blurred by in and out migration and by global connections (Mexico), or where rural is economically advantaged (Israel)? Can we reconcile ideas of rural communities as supportive when we see evidence of a sense of belonging (Israel) against that of suffering and family neglect (Thar Desert)? We do not propose changing the assumption of homogeneity, but call for further consideration of which 'heterogeneities' we wish to highlight and address.

Critical Human Ecology attempts to make the voices of marginalised groups heard (Keating and Phillips, 2008).

For the most part, researchers come from a place of careful, dispassionate creation of the evidence. We position ourselves as informers of action agendas rather than as leaders of them. Yet if we take seriously the incorporation of a global lens on environments of rural ageing, then we must see those who are most left behind. There is a place for a kind of theoretical activism here in making the invisible visible by creating evidence of the contexts that exclude at both

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global and local levels (Walsh, Scharf & Keating, 2017). It is only then that we can address the broad sweep of the UN assumption that [all] rural residents are at risk because of the places in which they live or that access to their immediate families reduces the risk. We propose the following revised assumption: *Critical Human Ecology makes the voices of marginalised groups heard by identifying and creating evidence of those who are rendered invisible by contexts that exclude.*

Framing the next decade of rural ageing studies

In this chapter we have incorporated global contexts into Critical Human Ecology theory, grounding our theorising within four cases from different world regions. Revised theoretical assumptions point to the next phases in our theory, research and action agendas on rural ageing studies. We present three main challenges:

1. To further develop components of global environments/contexts, parallel to the physical and social components of near environments that should be articulated and investigated for their impact on older (rural) people. As a starting point, we have identified: climate change, political instability, national values and ideologies, and transnational migration. These require further articulation across diverse settings.
2. To further develop critical perspectives on marginalisation, including recognising inequities, determining which can be addressed and where agency lies in addressing them.

3. To be self-reflective as rural researchers about whether ‘rural ageing studies’ is a useful disciplinary label given the theoretical and empirical challenges we have raised.

Disciplinary labels establish theoretical and substantive lenses on specific populations or topics. In the social sciences, they often arise from a wish to address aspects of the human condition that create vulnerabilities. Global discourses of older rural residents at risk of being ‘left behind’ place rural gerontology at the nexus of marginalized people and places. Yet our critical theorizing and evidence belie a unidimensional experience of exclusion. We must avoid reifying either rural or age, focusing on the intersectionalities of diverse environments and people across the global north and south; and about the ways in which these may create exclusion for some.

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Rural Malawi: Grandfathers raising orphaned grandchildren in sub-Saharan

Africa

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In rural Malawi, the state plus local and international NGOs provide cash and food transfers to mitigate livelihood challenges for vulnerable households. Among the most vulnerable are households with children orphaned by HIV/AIDS. Orphans account for 12% of children in Malawi. Over 80% are being raised by grandparents, including grandfathers. Yet support programs have limited coverage, marred by widespread fraud and corruption, nepotism and local politics. They are often gendered due to the feminisation of care in which grandmothers are credited with orphan care.

Grandfathers are systematically excluded from welfare support that targets orphans raised by grandparents. This exclusion is justified based on the assumption that grandfathers (like other men) cannot be trusted because they will use the money for beer or other personal needs instead of benefiting the children. Further, grandmothers are viewed as more vulnerable--frailer than grandfathers and with more limited economic opportunities-- and are deliberately targeted in welfare safety nets.

Subsequently, gendered conceptions of care may influence who (grandfathers versus grandmothers) gets access to social support in rural Malawi. Despite performing important care responsibilities for orphans, many grandfathers remain invisible in plain sight, as the care they provide is discounted and overlooked.

Thar Desert, India: Climate and deep exclusion

Prakash Tyagi, Executive Director, GRAVIS, India

<http://www.csrtimes.com/interviews/gravis-bringing-thar-to-life-dr-prakash-tyagi/13>

The Thar Desert of India is the most densely populated desert eco-system in the world.

Over 27 million people in the Thar Desert within the Rajasthan State live under extreme poverty and chronic droughts. There are about 2 million older people who live under distress, in poor health and with very little support. Most rural areas are overlooked in India, this one in particular because of being a desert.

Older people of Thar do not have regular sources of income. Agriculture is the only viable occupation, often failing due to droughts. Water insecurity and food insecurity are rampant causing severe malnutrition. Prevalence rates of diseases are very high with a double burden of communicable and non-communicable diseases (NCDs). Older women have even more serious challenges caused by isolation and social norms that give women no rights or resources. Widowhood is common in older women and is a serious social challenge. Older women always live within families where there is isolation and neglect. Health facilities are available at significant distances, are not affordable and are not of satisfactory quality. Lack of literacy among older people is a barrier to self-care education and in prevention and management of diseases.

Rural Mexico: International migration and well-being of older people

Patricia Rea Ángeles and Verónica Montes de Oca, Institute of Social Research, UNAM, Mexico

Mexico is one of the countries in Latin American with the highest rates of poverty and marginalization; 41% of its population is poor. Rural communities which comprise 23% of the country's areas, are particularly affected by immigration agreements with North America. Changes in cropping patterns, declining crop yields due to global warming, low prices for agricultural products, drug trafficking and armed violence, have led to a depopulation of the countryside and a process of migration to the United States that began in the 1940s. Older people who stay in the communities, live alone or care for grandchildren, counting on remittances from absent migrants. Now migration has stopped and mass return and deportation processes have begun, threatening the well-being of older people who are in poor health and live without pensions, in homes without basic services, with lack of transport to the cities and limited access to health and social services. They often are isolated with limited family networks and are subject to violation of their human rights. Despite this, the elderly continue to confirm their support role for family members residing in Mexico or abroad. They have an important role as transmitters of cultural traditions and ancestral knowledge to younger generations.

Israel Kibbutz: global ideological shifts

Liat Ayalon, Bar Ilan University, Israel

From the early 20th century, the kibbutz was an important type of rural settlement in Israel. Kibbutzim were established based on communal living and equality of consumption and production. Members were afforded high social status and often assumed national leadership roles. In the past, older adults in such settlements reported higher well-being and more family support than those living in other settings.

Israel now is predominantly urban with only 8% of the population living in rural settings and less than 2% of the population living in kibbutzim. In turn, kibbutzim have moved away from a focus on agriculture and communal life toward privatisation and individual goals. Those in desirable locations have turned the land into their number one commodity. This evolution is associated with some challenges to well-being of older adults, although even following the privatisation of the kibbutz, well-being remains high. A recent study (Dahan & Schwartz, 2014) shows that older people in the kibbutz still feel more connected to their community, have better access to services, report better financial status and are more socially engaged compared with older adults who live in other small communities or in the city.

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