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SPAIN: BETWEEN NORTH AND SOUTH

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The decade of the 1980s witnessed numerous changes of worldwide importance. The impact of these changes is still being felt today, in Spain as in other countries; western economies have entered a new phase in which production, technology and financial flows have passed from a local to a global scale. Lifestyles have also changed, and ecological problems have become a matter for major concern.

The fall of Communism in Eastern Europe has led to the establishment of a world system in which the Cold War confrontation and ideological competition between East and West have become obsolete. Technological progress and trade policies have broken down barriers and stimulated communication, economic exchange, movement of individuals, and the spread of ideas across national borders. At least in theory, there is a vision of a new system - the New World Order - a system in which regulations are standardized, and which integrates the whole of humanity.

The eighties saw the demise of the industrial model, and the dawn of the commercial or tertiary era. Since 1980, international trade has increased at a faster rate than production. The large multinationals have set up in different countries, dividing their activities internationally, and the three economic superpowers - the US, Western Europe and Japan - are the motors behind this exchange process.

Spain joined the European Community in the middle of this decade of change. One of the major effects of membership has been that the international dimension of the Spanish economy has increased notably. Commercial exchanges with other European Union countries have intensified, and now represent 60% of Spanish foreign trade. The largest growth has been in imports[1]. This article will look at developments since the beginning of the eighties.

1 The extent of this growth in foreign trade is shown in these figures: the sum of imports and exports of goods and services in relation to GDP was 35% in 1985, 45% at the end of the eighties, and 62% in 1995.

Spain's geographical position, at the westernmost point of Europe and the Mediterranean, has played a key role in the country's history. Spain is located on the trade route between the economic centre of Europe and its areas of influence to the south; it is the northernmost point of this «south», and the southernmost point of Europe.

This study considers the role of Spain exclusively as a scenario for intercontinental exchange. We will ignore the flow of goods generated by supply and demand inside the country's borders. In our analysis of the circulation of goods and people between Europe and Africa via Spain, we will concentrate on four main areas: transport infrastructure, migration, agriculture, and tourism.

As far as transport infrastructure is concerned, we will examine road and rail networks and port areas, given their crucial role in the development of an integrated transport system. Roads, railways and ports also help to give structure to the territory as a whole, and an acknowledgement of this role is essential to a comprehensive study of the flow of people and goods in the present and in the future.

Spain has a long history of population movement. Over the past two decades the direction of population flows has changed; Spain has become a country of immigration rather than one of emigration.

Finally, in the last section we will analyze the current situation of two economic activities which are closely linked to the land: agriculture, and tourism. Agriculture was the main economic activity, and the main source of currency, until the 1960s; since then tourism has superseded it in both respects.

1. TRANSPORT INFRASTRUCTURE IN SPAIN AND EUROPEAN INTERNATIONAL TRADE IN TODAY'S GLOBAL ECONOMY

1.1. Ports: The link with abroad

The conception of Spain as a point of contact or a transit zone between Europe and the rest of the world requires the analysis of a number of specific areas. One of these is international trade.

In today's global economy, trade is intense and covers vast distances. Intercontinental traffic is usually transported by sea[2], and since the 1980s ports have relied principally on trade for their livelihood, being, as they are, the interfaces between sea and land.

In this section we will look first at recent changes in the Spanish port system. Then we will analyze the present and future role of Spanish ports in trade between Europe and its geographical «south» - Africa, an area conceived as being directly dependent on it.

Spain's geographical situation and the country's history are to a large extent responsible for the evolution of the territorial and administrative structure of the port system and the importance and size of the different ports in relation to each other. Nonetheless, the overall shape of the port system has been profoundly influenced by the changes of the last decade.

2 World sea trade has doubled in the last twenty years. Container traffic has multiplied by fifteen the volume of goods transported.

1.1.1. Recent changes in the Spanish port system

With the end of the dictatorship, a number of changes were introduced in port administration. Under the new system known as the State of the Autonomies, small sailing and fishing ports came under the jurisdiction of regional governments. However, central government retained power over the commercial ports, the ones with greatest economic activity.

Two other factors have led to changes in the traditional structure of the port system. One was Spain's entry into the EU, and the other the introduction of a new model - the replacement of the port industrialization model by the port logistical platform.

Spain's negotiations for entry into the EC finally bore fruit in 1986. Since then, Spanish policy regarding its ports has had to adapt to community objectives and recommendations on ports and sea traffic, in areas such as management autonomy, free competition between ports, economic and financial self-sufficiency, the expansion of short sea shipping, and environmental protection, among others.

The port industrialization model polarized large raw material and energy traffic towards maritime centres and led to the creation of M.I.D.A.S. (Maritime Industrial Development Areas) in the large European ports. This system began to break up at the end of the 1970s as the industrial crisis became widespread. The port of the Fordian era was conceived as a point of rapid transit of industrial goods, automated and specialized, providing maximum fluidity for traffic and transporting it safely and reliably. The capacity for trade of the 1970s industrial port was practically nil. In Spain some ports - the ones that supply oil refineries or mines, or the ones next to industrial estates - still come under this category. Tarragona and Huelva are examples. However, the European prototype of the port-factory did not become common in Spain.

Around 1980 the world economy entered the post-industrial era. The fact that national borders were no longer the obstacles that they had been before, the interdependence of social and economic phenomena, and the international division of labour had a profound effect on the nature and volume of international trade. Today the port is no longer considered as a mere changeover point for goods. With its experience not only in maritime transport but in production, commercialization and finance, the port city takes on the role of strategic centre for the organization of foreign trade. In order to be competitive, all ports will have to attract goods whose added value can be increased in the adjoining city nearby or inland. In Spain, Barcelona, Valencia and Bilbao are examples of port cities whose activities are based on the development of telecommunications and logistics, and on the expansion of containerization.

To understand fully the ways in which Spanish ports have adapted to the requirements of international trade, we should consider some of the characteristics of international trade itself. In today's economy it is concentrated in the rich countries - the north, the centre of the capitalist system - and involves mainly manufactured industrial products. The three dominant commercial blocs, the main producers and exporters - US and Canada, the European Union, Japan and the *"four tigers"* of south-east Asia (South Korea, Taiwan, Singapore and Hong Kong) - compete fiercely with each other. The main direction of international trade in industrial products is north-north. The countries of the south specialize in producing and exporting raw material and commodities, and are largely excluded from the trade process.

The European Union is one of the major commercial blocs, and Africa, for geographical reasons and maybe also due to historical colonial links, comes under its sphere of influence. Spain is ideally located to participate in the circulation of goods between the two continents. Its involvement is currently deficient; transit is slow, due to the lack of adequate inland infrastructure.

Nonetheless, three features of the Spanish port system favour the development of short sea shipping: the large number of commercial ports along the Spanish coast, their size (many of them are medium-sized or small), and the country's position on the southern limit of Europe, and on the Atlantic arc[3]. Short sea shipping - the transport of goods by sea between countries in or near Europe - offers highly competitive advantages. It causes no traffic congestion; it has no negative environmental impact; it reduces the volume of land traffic; it complies with territorial equilibrium policies; and costs and energy consumption per tonne and kilometre are low.

By the 1990s, with the changes in Spain's political situation and the transformation of the world economy, the shortcomings of Spanish legislation on ports had become painfully obvious. In 1992 the *Ley de Puertos y de la Marina Mercante* was passed in order to create a new framework for port management and to increase the competitiveness of Spanish ports in Europe.

1.1.2. Spain's geographical situation and trade relations between north and south

Geographical factors are partly responsible for Spain's maritime history, and the location, numbers and specializations of its ports. The country's relief (with mountain-ranges parallel to the coasts, high average altitude, broken topography) and the relative lack of navigable rivers penetrating the interior led to a proliferation of ports and the practice of short sea shipping. This use of the sea continues today, as a result of the deficiencies of the transport infrastructure on land.

The country's geographical position at the southernmost point of Europe and to the west of the Mediterranean, at the very limits of the continent, far from the centre of European production and consumption, is one of the reasons Spain has not built up international hinterlands.

Other obstacles have been the problem of connecting the road network with the rest of Europe across the Pyrenees, and the deficiencies of the railway network caused by problems to do with gauge, the radial network, and access to docks. Nonetheless, the country's geographic position offers advantages as well. Spain is at the crossroads of the regular shipping routes that connect Europe with America, Africa, the Far East and south-east Asia. For this reason, the ports of the Canary Islands have specialized in bunkering - as have Ceuta and Algeciras, on either side of the Straits of Gibraltar.

The value of the strategic position of Algeciras on the Straits of Gibraltar has risen markedly in recent years, as a result of the increase in regular container shipping lines on round-world routes going east-west and vice versa. Algeciras's function as the hub of

3 In Spain there are 49 ports under state jurisdiction, which for administrative purposes are grouped in 27 Port Authorities. In 1994 total traffic was 262 million tonnes. This figure is low in comparison to other European states, and is due to the lower level of economic development in Spain and low population density. Only ten ports surpass the figure of 10 million/tonnes per year; together, these ports account for 70% of all Spanish sea traffic.

general freight in the extreme south of Europe is expanding day by day. It is an active centre of trans-shipping for containers in transit, representing 88.4% of the Spanish total; Barcelona and Valencia are the two other ports that deal in this kind of traffic, but their involvement is minimal in comparison. Algeciras is ideally located to participate in north-south European shipping lines; optimistic forecasts place it at the very centre of the distribution of freight to and from ports of the North Sea and the West African coast.

In addition to their involvement in international trade and goods traffic, Algeciras and Almeria play an important strategic role in passenger and private vehicle traffic between north Africa and Europe. This traffic is particularly intense during the summer months, as north Africans working in Europe cross through Spain on their way to their countries of origin to spend the holiday period.

1.1.3. Future perspectives

Clearly, if Spain's role as a transit zone for trade between Europe and the south is to grow, investment in land transport is vital. The future lies in integrated transport. The Logistic Platforms Network, built around the dry dock project in Coslada, in the centre of the country, is as yet incomplete; until it begins to function, port cities connected with intercontinental shipping routes will continue to organize the logistics of goods traffic. Elsewhere in Spain, Barcelona is the centre of a pilot scheme (the Llobregat Delta Plan) for the institution of Logistic Activity Zones.

Spain's geographical position no longer presents as many advantages as it once did. Other competitive transit points are evolving in the Mediterranean aiming to channel the flow of goods between north Africa and Europe. The north-south transport network between Liguria, Tuscany, Corsica, Sardinia and Tunisia is an example.

In the Mediterranean area, three Spanish ports - Barcelona, Valencia and Algeciras - hope to become centres of distribution, or hubs, for the south of Europe, due to their status as ports of call on the regular intercontinental container routes, and their specialized equipment and terminals[4]. The institutional agreements between RENFE (the national railway network) and the State Port Authorities, which date from 1993, and the spirit of the Infrastructure Steering Plan currently in force are examples of the political support for these ports. If they are to be competitive, road and rail connections will have to be improved.

Due to their position at the extreme south of the European Atlantic, the Canary Islands may well become important centres of distribution towards west African countries. In all events, their development depends to a large extent on the economic performance of these African states.

4 The port of Algeciras moved 11.9 million tonnes of general freight in 1994, 78.9% of which was transported by container. In the port of Barcelona the figure was 8.5 million tonnes (71.7% containerized) and in Valencia 8.0 million tonnes (63% containerized).

1.2. Land transport networks

1.2.1. The starting point: a long-standing structural disadvantage

At the end of the dictatorship, some twenty years ago, Spain was a long way behind other countries in infrastructural terms. Land transport (the road and rail networks) was no exception. In 1980, Spain had 155,000 km. of roads, one of the lowest figures in Europe in terms of population and surface area/unit. This was due above all to the underdevelopment of the secondary route network (with the exception of Navarre and the Basque country); levels of connectivity were correspondingly low and access to large areas of the territory was deficient, especially in mountain regions. The ratio between the main road network (national and regional highways) and the secondary road network (local roads) was (and still is) lower than 1:1, compared with figures of 1:3 in France and Italy.

The road network was not only limited in terms of length; it was organized on the basis of six large axes that connected Madrid with the rest of the peninsula. Changes to this radial model began in the 1970s with the construction of a motorway network. This network was mainly toll-paying, and in 1980 covered 1,620 km. It served only the north-east triangle of the peninsula (the Basque country, the Ebro valley and the seaboard of Catalonia and Valencia) and a few other points scattered around the country.

As for the railway network, it was only 15,000 km. long, including 1,800 km of narrow gauge track and the metropolitan train systems of Madrid and Barcelona. It was largely obsolete, with a substantial number of single-track lines which were out of date and lost money (many of them did not cover a quarter of costs, nor do they today). The difference in gauge of the track used in Spain and Portugal (1.668 mm.) and the rest of Europe (1.434 mm.) presented a further problem, as did the logistic shortcomings of RENFE, the state company in charge of the network, which were mentioned above in the section on ports (the negligible or zero development of intermodality, for example). In 1980 the Spanish railway network channelled less than 8% of passenger and goods traffic.

1.2.2. Infrastructural development since the eighties

In common with the port system, the evolution of the road and railway networks over the past two decades has been deeply affected by two political developments: the establishment of democracy and the subsequent policies of regional decentralization, with the advent of the State of the Autonomies (1978-1981), and Spain's entry into the European Union in 1986. The Olympic Games held in Barcelona in 1992 and the Expo in Seville brought with them other improvements, limited in scope but of considerable local importance.

The advent of democracy affected the road network in a number of ways. Firstly, planning was now characterized by greater technical care, fuller attention to questions of territorial organization, and, in general, a greater concern with democratic legitimacy. With the State of the Autonomies, territorial organization gradually came under the jurisdiction of the Autonomous Regions, whose vision of the territorial problems was obviously more acute than that of central government. Finally, entry into the European Union represented Spain's full integration in the large-scale projects and agreements on transport infrastructure at European level (e.g. the *emerald* road network connecting the north and west of Spain with northern Europe, priority rail lines and high speed railway); and the country received structural funds from the European Regional Development Fund, which were assigned for the most part to the development of infrastructure.

Inside Spain, the most important advance in the road network began with the passing of the General Roads Plan 1984/1991. This plan presented a critical review of previous plans which had revolved around the great radial axes mentioned above and the construction of toll motorways to solve the problems of road congestion. The main proposal of the new plan was to introduce toll-free motorways. The length of high capacity routes increased from 2,303 km. in 1984 to 6,157 km. in 1995.

At the same time, a number of Autonomous Regions (Andalusia, Galicia, Catalonia, the Basque Country, Navarre and Valencia) implemented regional road plans in their own territories. Nearly all of these plans laid particular emphasis on the role of the road network as a crucial element in the structure of the region and in the process of creating a balance inside it. These plans were financed in part by European Union structural funds. A large number of Spanish regions come under the description of the European Union's regional policy Objective 1 (underdeveloped regions), others under Objective 2 (industrial zones in decline) and Objective 5b (rural areas).

For its part, the railway network continued to be state-run, under the management of RENFE, with the exception of metropolitan railways and the narrow gauge network. The progress made here has been slower, and policies inconsistent, in spite of rationalization plans (closure of loss-making lines, etc.) and modernization. The construction of the high speed train between Madrid and Seville, and the current adaptation of various stretches of the network (between Madrid and Valencia and Valencia and Barcelona, for example) for high speed travel (at 200 km/h) are notable achievements. There have also been improvements in suburban train services in the large urban areas (Madrid, Barcelona, Bilbao, Valencia and Seville) which have witnessed consistent increases in passenger numbers.

1.2.3. Projects for the future: opportunities and problems

In today's socioeconomic context Spain faces three main challenges as far as its transport infrastructure is concerned (apart from the problems of logistics and intermodality noted above): first, to complete a network that serves the territory in a structurally efficient way; second, to guarantee effective road and rail communications with the rest of the European Union, both with Portugal to the west and France to the north; finally, to consolidate Spain's role as a bridge between Europe and Africa, a role conferred on the country by its geographical (or geostrategic) position.

1.2.4. Creating an efficient and comprehensive national infrastructure

The creation of efficient road and rail networks, gas and oil pipelines, communications and telecommunications on a national scale is the fundamental aim of the Infrastructure Steering Plan. This plan is based on a general view of Spain as a whole, and is broken down into a number of sector plans.

As far as the road network is concerned, there are problems and opportunities at both national and regional level. At national level the most pressing problem is the need to complete the plan for the *autovías* (dual carriageways) and the rest of the road network that give cohesion to the territory. The unfinished N-II, between Madrid and Barcelona, and the access roads to Galicia and Cantabria from Castile-Leon must be completed. A general model for financing *autovías* and motorways throughout Spain - that is, a definitive decision on the question of tolls - is also needed. The toll system causes imbalances between regions, as over the past few years a situation has evolved in which half of Spain pays tolls and other does not. The effect of the toll system should be measured in both economic and environmental terms. Users tend to take the alternative routes, parallel to the motorways, to avoid having to pay the toll; as a result, these roads carry high levels of traffic and are in constant need of repair and improvement.

At regional level, in order to provide an efficient and comprehensive structure for the territory, the secondary road network needs to be renovated and expanded, connecting areas which at the moment are isolated from the rest. The secondary route network is limited and of low quality in many Spanish regions. Communication is often poor; there are few alternative routes, and long-haul and local traffic both tend to converge on the few existing roads of high quality.

1.2.5. Road and rail communication with the rest of the European Union

Effective road and rail communication is needed with both Portugal and France. This requires, as a minimum, the modernization and adaptation of the road and rail networks laid down in European Union agreements and in Spain's bilateral agreements with Portugal, France and Andorra. The most urgent problems are the fact that the High Speed Train is not connected to the European network (its integration is a medium-term plan) and the need to adapt the railway gauge to the width used in the rest of Europe (a decision that has been postponed on many occasions).

At regional level, there remains the problem of creating links between areas on either side of national borders, areas which have been separated for centuries by a political frontier and which have largely turned their backs on each other. These border areas tend to be marginal (the strip of land next to Portugal, and regions in the Pyrenean mountains).

1.2.6. Communication with the north of Africa

Spain must confirm its role as a bridge between Europe and Africa, a role which, despite the country's ideal geographical situation, is as yet unconsolidated. This consolidation involves a large amount of infrastructure (ranging from the ports to the construction of a fixed link across the Straits of Gibraltar, via the construction of oil pipelines and telecommunication networks) and requires action on both sides of the strait. Whatever modernization Spain may carry out will have little effect if similar projects are not undertaken in Africa. As well as the motorways and railways connecting Algeciras with the rest of the peninsula and the Pyrenees, motorways and railways linking Tangiers and Tunis, and other modern road and rail communications connecting the north of Morocco with the south (and eventually with Mauritania and the rest of the continent) are vital to the success of the plan. The same is true of other infrastructure projects, such as the ambitious fixed link across the Straits of Gibraltar.

2. RECENT TRENDS IN MIGRATION

Over the last two decades, Spain's role in the international migratory system has undergone a real transformation which has brought with it the country's definitive integration in the European migratory subsystem. Spain has become a country of *immigration*, rather than *emigration*, and with this change new legal provisions to regulate the flow of immigrants from both north and south have become a necessity.

2.1. Spain's new role in the european migratory system

In recent decades, the international migratory system has been characterized by three features (COLLINSON, S. 1994)[5]: first, the intensification of international migratory movements; second, the emergence of worldwide migration, as the phenomenon of transcontinental migration increases and diversifies due to the advances in communications, the global nature of the economy, and the increase in demographic and economic disparities between different regions; third, the regionalization of emigration, emerging in the creation of spheres of influence, and guidelines which shape the direction of the migratory patterns.

In Western Europe, migration was an important element in the process of post-war economic expansion. All countries participated in this subsystem: northern European countries offered work to immigrants from the south and from other countries as well, especially former colonies. The economic stagnation which set in at the time of the oil crisis led to restrictions on migration, although it continued in a reduced form - for instance, family reunion was still permitted, some immigrants crossed borders illegally, and others sought political asylum. In recent years, the new contacts with the east have combined with pressure from the south to define new characteristics in a migratory system that is still assimilating the consequences of past movements.

One of the significant changes in the European system has taken place in southern countries. Until the mid-seventies, Spain and the other Mediterranean countries sent migrant workers to the north of Europe (mainly to Germany, France and Switzerland). This trend did not survive the economic crisis of 1973; the demand for workers fell dramatically, and many migrants returned home, the first symptom of a change which would emerge fully during the eighties. This transformation meant that Spain, traditionally a country of emigrants, now became a country of immigrants, and thus took on a new role in the European migratory subsystem.

2.2. Spain: crossroads of South-North and North-South migration

The new trends that have changed Spain's status in the migratory system bring flows of immigrants from Europe on the one hand and from Latin America and Africa on the other. This combination, together with Spain's physical position at the western limit of Europe, makes the country's migratory history unique.

There are two main kinds of European immigrants. The first, the minority, are highly qualified professionals (technicians or managers); as a result of the new work structures of

5 COLLINSON, S. (1994): *Europe and International Migration*, London, Pinter Publishers.

companies with international capital, the numbers of these professionals are growing, on the whole in the large production and service centres. The second class of immigrant, whose objectives are purely residential, is associated with the tourism industry on the coast. These people are either inactive or employed in sectors that offer services to their compatriots from north European countries who come to tourist resorts in search of the combination of a pleasant climate and a higher quality of life.

In addition, the restrictions on immigration in some European countries and the non-existence of an immigration policy in Spain until 1985 encouraged immigration from countries outside the European Community and converted Spain into a port of entry to Europe. Immigrants in Spain are from a range of countries, although in terms of numbers Latin America (for historical and cultural reasons) and Africa stand out. African immigrants are from the Maghreb, especially Morocco, and to a lesser extent from south of the Sahara, from countries such as Senegal, Gambia and Cabo Verde. These flows, sometimes motivated by political developments, result in increasing movements of labour and add to the mobility of human resources between the countries of the north and the south.

2.3. Spain's new inmigration policy

Until recently, numbers of foreigners living in Spain were relatively low. Emigration, rather than immigration, was the norm, as Spanish labourers went north in search of work. For this reason, Spanish policy until the mid-80s limited itself to offering support to Spaniards who went abroad. The legal vacuum caused by the fact that there were no laws or bodies that recognized the phenomenon of immigration was then filled on two levels - on the international level, with the adoption of European Community regulations, and on the domestic level, with the passing of laws that defined the rights and freedoms of foreigners in Spain.

The most important landmark in recent years as far as Western European immigration policy is concerned is the Treaty of Maastricht, which introduces a series of provisions which will shape immigration policy in the immediate future. The treaty stipulates that «any person who possesses the nationality of a member state is a citizen of the union» and includes among the privileges of these citizens the right to free circulation and residence in any member state. The European Council put forward a proposal for standardizing immigration policies which revolved around five points: standardization of admission policies; a common approach to the problem of illegal immigration: unifying policy on migrants who go abroad in search of work; the position of non-member countries; finally, a migration policy in the broader sense, including steps to regulate the phenomenon. These provisions in part conflict with the agreements reached at Schengen concerning the relaxation of customs formalities and the abolition of the police at borders between European Union countries. The apparent contradiction of two sets of regulations which aim to facilitate the free movement of individuals throughout member states is due to the delays observed in some countries in applying these principles, and the delays in creating common instruments of immigration control such as Europol. Due to its geostrategic position, Spain is the southern border of the European Union, a fact that has led to the introduction of immigration controls already in force in the rest of western Europe.

In parallel with this increased vigilance along the southern frontier of Europe, there have also been moves to create legislation to deal with the problem of immigration in Spain itself. Until 1985, the existence of the Spanish Institute of Emigration left jurisdiction on all matters related to foreigners in the hands of the Ministry of the Interior. A second temporary provision of the Organic Law of 1 July 1985 offered foreigners without papers the opportunity to «regularize» their situation. This campaign lasted from 1985 until 1986; it ended in relative failure, due to the inflexibility of the requirements and time limits. A further campaign was enforced in 1991-92; this campaign implemented an active immigration policy, centred on four points (IZQUIERDO, 1993[6]): gradual, controlled admission of legal immigrants, on a quota basis; recognition of the existence of illegal immigrants and improvement of their situation; redefinition of the right to refugee status; support for common policies defined by the Schengen agreements and the Treaty of Maastricht. These qualitative advances were also reflected in the creation of a Head Office for Migration, inside which a general subdivision deals exclusively with the problem of immigration. Finally, as an example of this slow but steady process of building an immigration policy, since February 1996 foreigners who have been resident in Spain for more than six years have been entitled to apply for permanent resident status, a development which recognizes the presence and stability of the immigrant population.

The future scenarios of international migration in Spain depend on the effectiveness of the application of these policies both in Spain and in the rest of Europe. Recent tendencies suggest that residential immigration from other European countries will fall off, given the increase in the cost of living in Spain which makes the country less attractive to foreigners; the movement of professionals between European countries will hold up or increase, due to practices such as relocation and to the new legislative framework of the European Union. As far as immigration from outside the Union is concerned, pressure is expected to increase, especially from north African countries, as a result of the demographic and economic differences between the northern and southern shores of the Mediterranean. This tension will be a serious problem in the absence of some form of cooperation- indeed, cooperation is a prerequisite to the success of any policy on migration.

3. GEOGRAPHICAL POSITION AND RELATED INCOME: AGRICULTURE AND TOURISM

The most important factors in the development of agriculture and tourism are the influence of the Mediterranean climate over a large part of the country and the length of the Mediterranean seaboard. The greater part of Spain's tourism industry is located along this coast, as indeed is most of the country's agricultural produce for export.

The proximity of the huge European market on the one hand and the Mediterranean climate on the other have propitiated the flow of agricultural produce and tourists. However, Spain's positional advantage is beginning to be threatened by the improvement in tourism infrastructure in countries of the southern Mediterranean and also by the increase in agricultural produce, in direct competition with Spanish exports, in the same countries.

6 IZQUIERDO ESCRIBANO, A. (1993): «La política de inmigración en España: costes y beneficios de la integración en la Comunidad Europea». *Sociedad y Utopía. Revista de Ciencias Sociales*, 1, 117-125.

3.1. Recent trends in production and agricultural trade in the new european context

Due to its location between the Atlantic and the Mediterranean and its considerable climatic diversity, Spain produces a wide range of food, typical of both the north of Europe and the north of Africa. In the northern half of the country, produce is generally continental (primarily cereals, meat and milk); in the southern half and on the irrigated Mediterranean seaboard, it is mediterranean (olives, vines; fruit and vegetables along the coast).

The historical advantage that this variety represented for the domestic market has been substantially affected by Spain's entry into the European Community with its larger market, preset regulations and agreements with non-member countries. The internationalization of the economy has a particularly telling effect on agriculture. The GATT made this clear; it freed trade, put an end to European protectionism for its agricultural products and opened the market to international products (mainly those of the US). The EU also has bilateral agreements with countries in Latin America, eastern Europe, and on the southern and eastern shores of the Mediterranean.

The Common Agricultural Policy caused spectacular changes in European agriculture. Technological innovations brought about rapid increases in yields and productivity, and the protectionist measures of the CAP provided incentives to increase production. Bearing in mind the lack of elasticity of a market whose population was no longer growing and whose levels of income had stabilized, the increase in production led to surpluses in products in which Europe had been historically deficient (such as cereals, meat and milk). At the beginning of the 80s, with the entry into the EC of Mediterranean countries, some of which (especially Spain) had considerable agricultural potential, it was feared that these surpluses would increase. To counter this, restrictions were imposed on certain products.

The policies protecting the most important products placed tariffs on products from outside the Common Market, and guaranteed the price levels of the produce of member states. This interventionism, together with the structural reorganization and modernization of concerns which were largely family businesses, meant that the costs of EAGGF had surpassed 70% of the community budget when Spain joined the EC. The CAP was then reformed in order to stem the upward trend of costs.

Spain had enjoyed preferential status in its dealings with the EEC since 1970, but on entering the Community as a fully fledged member the country had to adapt fast to a complex set of quotas (on milk and sugar, for example), co-responsibility levies (in cereals), and, in spite of the interim measures introduced in agriculture during the country's integration, to a gradual fall in support prices. The EEC was a market with strict limits on increases in the production of foodstuffs in which Spain showed a clear deficit. At that time, as the publication of the «Green Book» made clear, the CAP aimed to replace agricultural development with rural development, favouring the diversification of activity as a means of improving agricultural yields. In spite of the community measures, the costs of EAGGF continued to increase. In the following years stricter measures were enforced. First, penalties were introduced on surpluses, and limits imposed on the number of products with guaranteed prices. Then, aid was offered for extensivizing the use of agricultural land; farmers were encouraged to retire early, and support was given for forest and recreational areas.

With the advent of the GATT and pressure from the US on the EEC to restrict its protectionist measures in agriculture, the CAP has undergone new modifications. Instead now of an interventionist approach based on guaranteed prices and purchase of production, the CAP has introduced direct aid for farmers; at the same time internal prices in the EEC have come closer in line with prices on the international markets. Incentives are offered to farmers for production in recent years in terms of hectares and average regional yield: the larger the production, the higher the payment. This favours large-scale enterprises in the most productive areas of the EEC and hits small, family-based Mediterranean farming hard; it is further grist to the mill for southern European countries already concerned that their products are receiving considerably less protection than continental agriculture products. This development may increase the agricultural imbalance between the rich north and the poor south.

Spain's agricultural balance of trade can be summarized simply: the country imports continental products, and exports Mediterranean products. Both before and after joining the EEC Spain's exports have centred on Mediterranean foodstuffs, mainly from the irrigated coastal strip - fruit (citrus fruits and fresh fruits, dried fruit and nuts) and vegetables, with a traditionally favourable balance of trade. However, since the sixties[7] the importation of continental products (mainly animals and animal fodder) has increased; Spain now imports more than it exports, and the trade balance has deteriorated since the country joined the EEC. Its coverage rate fell to 80% in 1992, although the continual devaluations of the peseta have changed the trend somewhat since then.

Spain's natural market for agricultural products is the EC (involved in 56% of imports and 74% of exports in 1994), due in the past to its geographical proximity and to similarities in consumer habits, and since the eighties due to membership. Imports show more diversification than exports. Imports continue to be mainly products for animal fodder (9.5%), a figure that has risen in recent years due to the drought; oil-seeds (8%): eggs and dairy produce (7.8% - because of the low quota designated to Spain the country's imports of these goods are steadily increasing) and meat and live animals. Exports are based on only a few products: fruit and vegetables, which amount to 44% of the total value (53.2% if transformed products are included); then wine, 10.1% and oil, 8.43%. The export of other products comes a long way behind, and is often sporadic.

Given the composition of Spain's agricultural balance of trade and the fact that the country has begun to import products that traditionally it has exported - fruit from Chile, Argentina and Turkey, vegetables from Morocco - it is hardly surprising that there is concern about the commercial agreements between the EU and countries on the southern and eastern shores of the Mediterranean whose agricultural produce is similar to that of southern Europe. These countries have recently begun agricultural diversification programs - producing citrus fruits, tomatoes, potatoes, flowers - which will bring them into competition with the Mediterranean members of the EU, principally Spain.

The non-member states of the Mediterranean have had preferential economic relations with the European Community since its inception. The agreement was extended and standardized in 1972 in an attempt to consolidate relations between the two shores, leading to an increase in exchanges and movement of labour from the southern countries towards the EEC

7 The sixties witnessed important changes in Spain in a number of different fields: large movements from rural to urban areas, increases in income, changes in eating habits towards more «European» foodstuffs, primarily animal-based.

and investments and technology transfer in the opposite direction. With the association agreements such as the ones recently signed with Morocco and Turkey and the one already in force with Israel the European Single Market will spread to the southern shore of the Mediterranean. The agreements signed in Barcelona during the 1995 Mediterranean Conference foresee a free trade zone including twelve countries from the north of Africa and the Near East by the year 2010. Agriculture will be phased in gradually, in order to allow southern European countries time to adapt to the new situation, since a key element of the agreement as far as non-member states from the southern shore are concerned is the export of their agricultural produce to the EU, bringing them into direct competition with southern European countries. The primary sector is of great importance in the GDP of these non-member states, as is the proportion of the population living in rural areas and who depend on the land for their livelihood.

Although these agreements are in general beneficial to the Spanish economy, given the country's geographical proximity to the markets now opened up in the south, Spanish farmers immediately protested[8] because of the threat to their traditional exports that competition from north African products will represent. Spanish farmers demand that Brussels block the import of low-price fruit and vegetables from the north of Africa. Prices are low due to what is known as social dumping - multinational distributors buy up large areas of land in the Maghreb and produce fruit and vegetables at very low cost. The Spanish claim that the agreement with the north African countries will not really benefit its farmers, but only the existing large-scale agricultural concerns; in addition, they argue that the agreement will put an end to the agricultural system in Spain based on family farming and cooperativism. They suspect that the issue of agricultural produce has been used as a way of compensating the north African states for the fishing treaty signed by the EU and Morocco.

Nonetheless, the figures show that the export quota permitted in the agreement is not far above the current levels of north African exports to Europe and cannot honestly be said to endanger Spanish exports - exports which have in fact increased in number in recent years. Overall, agroalimentary imports from the southern and eastern shores of the Mediterranean represent only 6% of the EU's total imports in this sector. Indeed, the EU's agroalimentary balance with these countries is clearly favourable, as it exports large quantities of continental products. Cereals, of which France is the major exporter, make up 22% of the Community's agricultural exports to the region; dairy products 12%, mainly from Holland, and meat (7%), mainly from Ireland[9]. All in all, then, the agreements of the Euromediterranean Conference in Barcelona really signify little more than the consolidation of the existing commercial flows in agricultural produce. The danger for Spanish farmers and producers of fruit and vegetables lies not in the Euromediterranean agreements, but in the GATT, which will dismantle the EEC's traditional system of frontier prices and will break down all barriers to the mass entry of products from outside the Community at certain times of year.

8 Comparisons have been made between the attitude of Spanish farmers towards the commercial agreements between the EU and the countries of the southern Mediterranean and the attitude of French farmers vis-à-vis Spain's entry to the EEC a decade ago.

9 Fruit and vegetables represent 7.5% of the exports of the countries from the southern and eastern Mediterranean, followed by textile fibres (4%), tobacco, etc. The EU is the major buyer of these products; fruit and vegetables represent 57% of the community's agroalimentary purchases (DARP, *Estadística i cojuntura agrària*, September-October 1995).

3.2. Tourism

With the internationalization of the economy and the new trends in the phenomenon of tourism in general, new patterns are emerging in tourism in Spain, modifying the country's geostrategic position in the Mediterranean basin. New needs and motivations are influencing the features that have traditionally defined Spain's tourism model, a model which has evolved over recent decades thanks to the expansion of the economies of western countries and which in its short history has had to adapt to major change once already, during the oil crisis of the seventies.

A number of distinctive features define tourism in Spain: a) the predominance of mass middle-class demand; b) the predominance of accommodation in mid-range hotels and apartments in coastal areas; c) large-scale commercialization via international tourist operators; d) an intense, constant increase in numbers of tourists, hotel rooms and other types of accommodation, figures often used to demonstrate the dynamic (and the success) of Spanish tourism; e) its seasonal nature, a factor which has far-reaching consequences; f) the high profile of inland tourism; g) the success of residential, second-home tourism, with the result that a part of the demand is now characterized by a certain permanence which distorts the specifically touristic functioning of the sector. Residential tourism has channelled substantial foreign investment, especially from Arab countries.

During the seventies the oil crisis caused tourist numbers to fall and led to major difficulties in the hotel sector. Tourism then recovered, although its evolution has been cyclic; expansion in the middle of the eighties, and a recession at the end of the eighties and beginning of the nineties which raised serious doubts about the structure of Spanish tourism as a whole. Since then, though, the industry has again recovered, and in 1995 a new record was set: 63 million foreign visitors, of whom 44.5 million were tourists. In 1980 the number of visitors was 38 million; in 1988, 54 million, and in 1990 back down to 52 million.

With the recovery of the tourism industry and the subsequent evolution in the parameters used to measure it - today we hear talk of saturation in the summer, and the creation of «plans of excellence», aimed at attracting quality tourism - the structural change hypothesis has lost some of its force. From this more objective viewpoint observers speak of negative balances, caused by the unfavourable nature of the prevailing conditions, and changes in patterns. But these negative balances do not add up to a crisis; they reflect the fact that the market is not longer one of demand, but one of supply.

The present spatial structure of international tourism presents considerable asymmetries. Most movements are intra-continental, and most tourists go southwards - no more clearly so than in Europe - or from inland towards the coast. At regional level, in the case of the Mediterranean basin, the asymmetry between the northern and southern parts is plain to see, both in terms of supply (the European Mediterranean represents around 93% of the total offer, most of it concentrated in Spain) and in terms of number of visits (the European Mediterranean countries receive around 160 million visitors per year, twelve times the figure in countries on the southern shore).

The global nature of economic activity and population movement has led to the internationalization of capital and tourist sector companies, the concentration of companies and the multi-sector nature of tourist companies or companies that operate in the sector. Some Spanish tourist companies, for example, leaders in the hotel sector, are currently undergoing a process of internationalization. Nonetheless, the changes in the spatial structure of tourism at global or regional level are not deep-seated enough for us to speak of fundamental modifications in volume and direction of flows of tourists. The popularity of tourist destinations, and tourist nationalities may vary, but not significantly so. In spite of a number of new patterns, the map of international tourism remains basically the same; although both have lost some of their prominence, the Mediterranean remains the most popular tourist area in the world, and inside the Mediterranean Spain remains one of the main destinations.

We could take these arguments further. In the future, in spite of the new patterns of supply and demand and the relative decline of the «sand and sun» product, the basic factors behind the spatial distribution of tourism will remain the same, due to their structural character - physical and environmental factors such as geographical situation and climate, and geopolitical factors such as political and social conflict, or real and perceived personal safety. We should add to this the rigidity of the offer, and the dependence on climatic factors inherent in the creation of tourist infrastructure. All in all, it appears that «sand and sun» tourism will continue to be popular, although it will have to compete with other destinations offering the same product and also with the emergence of specialized or alternative tourism.

Maintaining Spain's tourist industry in the face of change (new motivations on the part of the customer, active and personalized tourism, shorter and more frequent holiday periods, new competitors) and the demands of a new international scenario has required a series of measures and the creation of a tourism policy aimed at modernizing accommodation and improving the quality of tourist resorts by providing them with new equipment and installations. To this end the central government produced a Framework Plan for Spanish Tourism, which served as an overall guide for the autonomous governments, especially Andalusia, Catalonia, the Balearic Islands and Valencia, for their actions within their respective territories. Between 1992 and 1995 Spain spent almost 50,000 million pesetas on improving quality, innovations, modernization, and staff training.

The fact that Spain is a EU member state means that the country must consider community policy on tourism as well. We should make two points here. First, European Union ministers for tourism have admitted their inability to solve the problem of «bottle necks» that affect the sector (volume of air traffic, tourists' safety, the environment, among other things) which of course are not their responsibility. Second, in the strict sense of the term there is no European policy on tourism, nor will there be one in the near future, judging from the recent (1995) declarations of ministers for tourism of member states, and their stated unwillingness to cede national hegemony on tourism to the European Commission. The structural reasons behind these attitudes are obvious - tourism means entirely different things to the countries of northern Europe and the countries of southern Europe. The interests of Spain, a country that receives tourists differ widely from those of a country that sends them, as would the strategies that the two countries are likely to propose. Nonetheless, there is a desire on the part of the authorities to work towards a minimal policy aiming to deal with the problems that tourism causes and to implant common criteria in common issues. They have requested that a joint document, produced at the informal meeting in Calvià, Majorca in 1995, be introduced in the revision of the Treaty of Maastricht.

An evaluation of tourist numbers and of Spain's position in Mediterranean tourism indicates that the country's geographical situation, the southernmost point of the north, is reflected in the role that the country has played ever since the era of the traditional tourism model began. International tourism remains both an important phenomenon in the relationship between north and south and a potent symbol of this relationship; it redistributes resources and goes some way to balancing foreign trade at different levels. Spain's position in the south of Europe and on the Mediterranean has produced large-scale tourism with considerable economic benefits that have greatly helped the country's balance of goods and services.

Spain's position as the northernmost part of the south is reinforced by the fact that Spanish tourists also travel abroad. Over the last two decades this trend has increased considerably; now some 7-8 million Spaniards go abroad per year, a figure close to that found in other developed countries in Europe. A small part - some 150,000 tourists - go to destinations in the southern Mediterranean (north Africa and the Near East).

Spain's role as the northernmost part of the south is also linked to the loss of around a million tourists per year from the rest of Europe who now choose new beach holiday destinations in countries that are relatively near - Greece, Turkey, Morocco, Tunisia, on the southern and eastern shores of the Mediterranean - and in direct competition with Spain. In the short term it is calculated that the tourist infrastructure in these countries, still relatively recent, will not be able to compete with European Mediterranean countries in terms of size. However, Spain will lose the advantages that the value of the peseta has provided, as a result of monetary union and the economic convergence represented by Maastricht (with the relativization of the value differential of the peseta and the introduction of the euro) although the ever closer links with countries that have traditionally sent the largest number of tourists will obviously be beneficial to Spain.

The future of Spain's geotouristic position will be defined by the new global economy, the impact of the country's membership of the European Union, the expansion of the European Union towards eastern Europe, and the creation of the Euromediterranean region, scheduled to become a Free Trade Zone by the year 2010.

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