

**Social Studies Collection**

No. 31

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# Immigration and the Welfare State in Spain

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Francisco Javier Moreno Fuentes

María Bruquetas Callejo



**Welfare Projects**  
"la Caixa" Foundation





**WELFARE PROJECTS. THE SPIRIT OF "LA CAIXA".**



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# Presentation

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Immigration is one of the social and demographic phenomena that has most transformed Spanish society in the last two decades. Currently, foreigners constitute approximately 12% of the population of Spain, a proportion similar to that found in European countries with a long tradition as recipients of migration flows.

The increase in the number of immigrants has been the result of sustained economic growth, and this influx of workers from other countries, both men and women, has provided plentiful, flexible and relatively cheap labour in sectors such as construction, agriculture and services. It is also noteworthy that this sociodemographic transformation has taken place up until now without significant social tension or conflict.

However, this situation may be changing since the onset of the serious economic crisis which began in Spain in 2007 with its corresponding dramatic increase in unemployment, budget cuts and cuts in social services. In this context, some sectors of Spanish society have begun to question not only the arrival of new immigrants, but the role of those already present and their impact on the welfare state and its future sustainability. These types of debates, too often based on prejudices or stereotypes not supported by the evidence, demand rigorous and objective analysis based on empirical data. It is in just such a context that this study acquires special importance.

In its analysis of immigration and its relationship to the welfare state, the present study provides data and reflection in three respects. First, the authors examine immigrants' access to and use of the health care and education systems and social services, highlighting inequalities affecting immigrant groups which should be the object of policies aimed at responding to the challenges of equality and equity.

Secondly, the authors analyze the contribution of immigrants to Spain's social protection system, whether through their social security contributions and taxes or through their employment in the system for the provision of personal services and care, in which oftentimes working in an irregular situation, they help to resolve the difficulties of a welfare regime strained by social change caused by both an ageing population and the growing participation of women in the labour market. Based on this analysis, the authors raise the issue of the economic sustainability of the Spanish welfare state in the face of the challenges it must address in the future.

Lastly, the study presents data on the evolution of attitudes in Spanish society toward immigrants, and in particular regarding the access of immigrants to social protection systems. This analysis, also using data from other neighbouring countries, offers indications of the risk of conflict as well as public support for the social protection and redistribution policies underlying the welfare state, thus, enabling us to analyze the social sustainability of Spain's social protection systems.

With this edition of the "la Caixa" Foundation's Social Studies Collection we seek to contribute to the debate on immigration and the welfare state through the analysis of objective indicators. These indicators allow us to evaluate with greater accuracy the impact of immigration on the sustainability of public services and social protection systems and, in addition, to anticipate the dangers and opportunities that may appear in the future. Only through informed analysis, such as that provided by the present study, can measures be taken that will guarantee social cohesion and the survival of the welfare state.

**Jaime Lanaspá Gatnau**  
Executive Director of  
"la Caixa" Welfare Projects  
and Chief Executive Officer of  
the "la Caixa" Foundation

Barcelona, May 2011

# I. Introduction

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In the mid-1980s Spain began to transform from a source of migratory flows to a country of residence for a growing number of foreigners. In the last two decades the proportion of foreigners has increased to 12.1% of the registered population (more than 5.7 million persons), making Spain the country with the second highest number of foreigners in the European Union (EU-27) after Germany.

As striking as the scale of recent immigration is the speed with which it has occurred. Since 2000 the pace of foreigners settling in Spain has accelerated sharply, above all in the years 2000-2005, during which the annual intensity of settlement reached 16.8 foreigners per 1000 inhabitants (Izquierdo, 2006). Starting in 2005, the volume of migration flows to Spain decreased significantly but still remained higher than the European average. As a result, between 1990 and 2005 Spain became one of the primary destination countries for immigration in the world, joining countries with a long tradition as receivers of migration flows, such as the United States and Germany (United Nations A/60/871, 2006: 31).<sup>(1)</sup>

The transformation of the role played by Spain in the international migration system has had a profound impact on the country's production system, in particular on the labour market, which has been significantly changed by this phenomenon. Half of the new jobs created between 1995

(1) This study has been carried out with the invaluable collaboration of Inés Llinás in the treatment, selection and presentation of the vast amount of statistical data managed during its preparation. The authors would also like to express their gratitude to José Manuel Rojo, Carlos Bruquetas Callejo, Celia Mayer, Ana Arriba, Pau Mari-Klose, Marga Mari-Klose, Inés Calzada, Amparo González and Alessandro Gentile for their collaboration during different stages of the preparation of this text. This work has been carried out under the auspices of the projects INMEBEA (Inmigración y Estado de Bienestar en la España Autónoma, Plan Nacional de I+D, Ref. SEJ2007-67521/CPOL) and WAE (*Welfare Attitudes in a Changing Europe*, Plan Nacional de I+D, Ref. CSO2008-02874-E/SOCI).



and 2005 were taken by foreigners, who went from representing 4% of social security affiliates in 2001 to more than 10.5% in 2010. The immigrant workforce has facilitated the shift of Spanish workers toward other jobs with better working conditions. In addition, women immigrants working as ‘care workers’ have contributed significantly to the increase in the labour force participation rate of Spanish women by taking on many of the tasks generally associated with the home, including both the care of dependent persons (the elderly, those with disabilities and children) as well as domestic tasks. Overall, immigration played a fundamental role in the significant economic growth which took place in Spain from the middle of the 1990s until the end of 2007.

Immigration has also led to a large-scale social and demographic transformation with important implications for public policy, in particular regarding social protections schemes included under the generic heading of the welfare state. With the settlement of foreign-born population groups, new social needs have emerged resulting in increasing demands for services and their diversification. This situation has overwhelmed Spain’s public administrations. Their response, lacking in foresight, has been primarily reactive and improvised, oriented above all toward responding to the most visible and pressing needs.

In this context, immigration has become an issue of great public concern in recent years as revealed in periodic barometers of public opinion conducted by Spain’s *Centro de Investigaciones Sociológicas* (CIS) [Centre for Sociological Research] since 2002. Although there is still a predominantly favourable attitude toward immigrants, the autochthonous population increasingly believes that they are in competition with immigrants for jobs and services (healthcare, school places, housing and public assistance, etc.) (Cea D’Ancona and Vallés, 2008, 2009). This growing perception of competition fuels support for limiting the rights of immigrants and opposition to adapting social programmes to meet the specific needs of the immigrant population. Among broad sectors of the autochthonous population, the perception that immigrants are favoured in the provision of public resources has provoked a communitarian and/or nationalist reaction of ‘those from home first’ (Colectivo Ioé, 1995).

Anti-immigrant attitudes are reinforced in a period of economic crisis such as the current one, characterized primarily by very high unemployment and budget cuts that directly affect social protection programmes. In particular,

the current situation benefits ‘political entrepreneurs’ who seek to transform citizen concerns into distrust of immigration, seeing this as a way to get votes. Although the political discourse regarding immigration among the major Spanish political parties is still in a phase of definition, this issue has begun to gradually be included in electoral programmes and campaigns (Zapata-Barrero, 2003), contributing in some cases to the development of an erroneous view of the relationship between immigration and the welfare state. In general, receiving societies address the management of migratory flows from a utilitarian perspective, in which immigrants are welcome to the extent that they are net contributors toward the financial sustainability of the welfare state.

A number of studies regarding the relationship between immigration and the welfare state have used cost-benefit analysis from a rational choice perspective. According to this approach, immigrants develop rational migratory strategies aimed at optimizing their benefits and minimizing costs/efforts. Framed in this way, the possibility of accessing welfare state services and benefits in the destination country would then constitute a particularly important element in deciding to emigrate.

In contrast, this study addresses immigration and its relationship to the welfare state from a more comprehensive perspective, taking into consideration the institutional dimensions of migration. It is necessary to understand immigrants and their economic and survival strategies in the institutional context of the host country (characterized by the interrelationship between the economic system and existing social protection programmes, as well as by the social and political context), given that this context determines to a great extent the alternatives available to migrants. In addition, we believe that it is important to recognize all the roles played by immigrants in the receiving society: workers, family and community members, users of welfare services, but also providers of personal services, citizens and contributors to the public treasury through their taxes (direct and indirect) and contributions to social security.

Our study aims to provide the basic conceptual tools, along with key statistical data, to understand the complex relationship between immigration and Spain’s systems for social protection. Using available statistical data and systematically reviewing the specialized literature, we will present a rigorous and well-documented view of this relationship; in this way, we seek to educate public

opinion on the fundamentally positive effects of immigration on the welfare state in Spain.

This book is structured around five clearly differentiated analytical aims: 1) to study the way in which populations of immigrant origin access the benefits and services of the different social protection programmes which constitute the Spanish welfare state; 2) to analyze inequalities, both in the ways these programmes are used as well as in their results among immigrant populations, including a look at the main institutional responses developed in the welfare sphere; 3) to describe the role played by immigrants in the caregiving field, the central element in the adaptation of the Spanish welfare regime to the important socioeconomic changes that have taken place in Spain in recent decades; 4) to analyse the implications of migratory phenomena on the economic and social sustainability of the Spanish welfare regime, and 5) to present the major challenges faced by Spanish society and in particular, the social protection system, as a consequence of the settling of immigrants in Spain.

The relationship between immigration and the welfare state is an area that has not been closely studied in Spain. However, it is possible to find some pioneering studies on the relationship between immigration and Spain's social protection systems in the literature on migrations in the fields of sociology, political science and economics (Aparicio and Tornos, 2002; Izquierdo, 2003; Cachón and Laparra, 2009; Otero, 2010), and we have used these as a starting point in developing our study. There are also a number of studies which address specific aspects of this relationship (immigration in relation to the labour market, to education, etc.), and we will refer to these secondary sources in the corresponding sections.

In addition to reviewing the existing literature on this issue, the present volume is based on the statistical exploitation of a series of data bases developed by different public bodies in Spain (*Instituto Nacional de Estadística*, *Centro de Investigaciones Sociológicas*, *Banco de España*, government ministries and autonomous regional governments) Third sector institutions (the FOESSA survey on social exclusion) and international organizations (Eurostat, OECD, United Nations). Our statistical analysis enables us to distinguish the factors which are most important in understanding the relationship between immigration and Spain's social protection systems.

From the various statistical sources used in the preparation of this study we have selected data which provide reliable indicators of immigrant groups' access to and use of Spain's social protection systems, as well as indicators related to the appearance of inequalities which specifically affect immigrant groups. This has not been an easy task as the statistical tools available to analyze the situation of these recently arrived populations are limited and not very precise. Of the multiple surveys used, only the National Immigrant Survey 2007 (*Encuesta Nacional de Inmigrantes 2007*) was specifically designed to study the immigrant population residing in Spain. In the majority of surveys, immigrants are clearly underrepresented, limiting the possibilities of analyzing the specific situation of this population. As a strategy in response to the lack of representative statistical data regarding immigrant groups, we have increased the number of sources used. In the case of the Living Conditions Survey (LCS) (*Encuesta de Condiciones de Vida*) – a particularly rich source of information on a broad number of aspects related to the participants inclusion in different dimensions of society – we have combined the surveys from 2004 and 2008 with the aim of increasing the size of the immigrant sample.<sup>(2)</sup>

The structure of this book reflects the central issues that have guided our work. After this introductory chapter, we examine the basic characteristics of both the Spanish welfare state and the migratory flows to Spain that have taken place in recent decades. The third chapter looks at the extent to which immigrants enjoy rights of access to the Spanish welfare state's different social protection programmes. To examine this issue we start with the idea that access is measured by three fundamental factors: 1) the different categories for foreigners established by Spain's legal framework and the rights associated with each category; 2) the type of existing welfare regime and its philosophy regarding coverage, and 3) the structure of the labour market and the form of insertion possible for immigrant workers.

(2) The LCS is a survey with a longitudinal component (in other words, participants in the survey are interviewed annually for four years, while a quarter of them are renewed with each cycle) which is aimed at monitoring the living conditions of the population. The only way to combine two cycles of this survey was, therefore, to add the samples from the first (2004) and the last cycles (2008) available, so that the individuals interviewed were completely different (having produced a complete rotation of all the participants from the first cycle in this four year period). The sum of both cycles permitted us to double the size of the sample and, as a result, increase the presence of immigrants.

Chapter four examines to what extent formal rights of access to social benefits translate into the effective use of these benefits among immigrants, also analyzing the existence of inequalities which particularly affect immigrant groups. We understand that the translation of rights of access into concrete and measurable results is not automatic but mediated by a series of variables ranging from differences in use – attributable to factors such as the socioeconomic level of immigrants or the cultural specificities of different immigrant groups – to the problems that can emerge when immigrants attempt to exercise those rights. These problems may arise from the nature of the programmes themselves, from difficulties in the implementation and execution of policies related to the behaviour of professionals or civil servants responsible for their effective application or from institutional obstacles or discrimination. We also briefly review the initiatives adopted by Spain's public administrations to respond to the specific needs of immigrant origin groups within the framework of their policies for managing diversity.

In chapter five we analyze the effect of immigration on the systems for the provision of care characterizing the Spanish welfare regime. Our aim is to overcome the biased image which views portrays immigrants only from the standpoint of their demand for social benefits and services. This is followed by an analysis of the contribution immigrants make as providers of services in a welfare regime that has been affected by major social and demographic changes. In particular, this chapter will analyze the role of women immigrants in the evolution of the systems for the provision of care and personal services to families in Spain.

The role that immigration can play in the future sustainability of the Spanish welfare state, both from a financial as well as social perspective, is the central theme of chapter six. The impact of immigration on the finances of the welfare state is a controversial issue, and therefore we review the literature on this, comparing data available on the contribution immigrants make to public finances as well the cost of their use of social services. Regarding the social sustainability of the welfare state, we analyze the data available on the impact of immigration on public attitudes toward redistribution, examining theoretical discussions about the decline of support for social protection policies in ethnically heterogeneous societies. To do this we look at the extent to which the Spanish population

holds negative attitudes toward the immigrant population and/or towards the extension of social rights to these groups.

Finally, chapter seven presents the conclusions from our study, structured around an analysis of the fundamental challenges that immigration raises for Spanish society in general and for the social protection systems of the welfare state in particular.

## II. Principal characteristics of the welfare state and migration in Spain

---

This chapter provides basic conceptual tools to understand the different dimensions through which we will analyze the relationship between immigration and the welfare state in Spain. We will first briefly review the academic debates on the nature of the welfare state and its relationship to immigration. We will then provide a description of the basic characteristics of the Spanish system of social protection, and finally, we will look at recent migration in the Spanish context, focusing in particular on the impact this phenomenon has had on the labour market.

### 2.1. The welfare state and the integration of immigrants

During the 20<sup>th</sup> century European countries developed complex social protection schemes aimed at protecting their citizens from what were considered to be the primary social risks. Initially, risk protection was aimed at poverty, understood as the lack of resources resulting from the loss of earnings due to ageing, unemployment or illness. The response to the risk of poverty was the basis for the origin of social security systems in the majority of western European countries. As social policies in Europe developed, the range of social risks and needs attended broadened to include among others, maternity, disability, homelessness, education, healthcare and integration. Although such social policies were generally promoted by states, the specific mechanisms to regulate, finance and administer them were based on characteristics and circumstances specific to each country at the time that these programmes were designed and implemented.

The first studies on these systems of social protection under the rubric of the welfare state were focused, above all, on comparative analyses of levels of public spending, trying to measure what Wilensky and Lebeaux (1958) called the “welfare effort” made by each state. These studies gradually broadened to include analyses of results and the impact of programmes, focusing on, for example, a specific group of beneficiaries of a social protection scheme or the impact of protection schemes on social inequality. Esping-Andersen’s contribution (1990) of the concept of the “welfare regime” was a key contribution to our knowledge of systems of social protection. In the work of this author, the welfare regime refers to the roles of state, market and civil society (including families, informal networks of solidarity, the third sector) in ensuring that citizens’ needs are met. Each welfare regime corresponds to a specific economic-industrial configuration, as well as to a specific type of labour market (Rhodes, 1996). In his typology, Esping-Andersen proposes the existence of three ideal welfare regime models (liberal, conservative-corporatist and social democratic) based on their degree of “decommodification”, understood as the possibilities that each regime offers its citizens to live independently of the market.

The liberal regime (characteristic of Anglo-Saxon countries) aspires to a minimum of state intervention and is defined by the central role assigned to the market, regarding both obtaining the resources necessary for subsistence and the provision of benefits and services linked to welfare. In this model the state plays a residual role, providing relatively modest public services based on strict income verification systems so that its degree of “decommodification” is very low.

The conservative-corporatist regime (typical of central European countries: Germany, Belgium, France, etc.) is characterized by social insurance systems based on participation in the labour market. Employer and worker contributions serve to finance systems of social security which allocate benefits proportional to income and based on workers’ employment status. This type of regime seeks to maintain existing social relations and provides an intermediate degree of “decommodification”.

The third ideal type of welfare regime, the social democratic (found especially in Scandinavian countries), is characterized by the central role assigned to the state in guaranteeing a high level of social protection to its citizens. In this



model, the role of the market is secondary, as the responsibility for reaching full employment and providing income maintenance corresponds to the state in a regime with a high degree of “decommodification”.

Following the conclusions drawn from the debates on welfare regimes, the typology described had to be supplemented with a fourth model known as the “Mediterranean” regime, specific to countries in the south of Europe. This model combines the conservative-corporatist logic of social insurance in some programmes (retirement pensions, unemployment benefits), with policies of a universal character in others (health and education), as found in the social democratic model. In the Mediterranean model, the state plays a complementary role to that of families, which function as the central element in the social order (Moreno, 2006; Ferrera, 1996). This regime occupies an intermediary position on the “decommodification” scale, and it is this model which best fits the specific characteristics of the Spanish welfare regime.

Despite the long tradition of research on the welfare state, its relationship to migration has only recently received systematic attention. Similarly, with only a few notable exceptions (Soysal, 1994; Geddes, 2003), studies dedicated to the analysis of migrations have tended to ignore the welfare state, as if the integration of immigrants in host societies was only based on *ad hoc* policies and structures oriented to encouraging the integration of immigrant populations. The reality, however, is that welfare schemes are the primary institutional mechanisms involved in the social integration of immigrants.

In response to the lack of research on the relationship between the welfare state and immigration, some recent studies have begun to explicitly address this subject. These studies can be classified into three major groups based on their primary focus.

The first line of research has focused on immigrants’ use of social services. These studies, fundamentally economic in nature, represent the majority of the bibliography addressing the issue of immigration and the welfare state, and most of them have been carried out in the United States and to a lesser degree, in European countries such as Germany. Focused on cost-benefit analysis, they analyze the financial impact of the immigrant population on public finances. The basic problem with these studies is their very limited scope; from the perspective of demand, they tend to focus on a small number of social protection programmes

(use of unemployment subsidies or other social services), while offering an excessively simplistic quantification of the role of immigrants as contributors to the public treasury. In chapter five we will discuss these studies in greater detail as part of a broader discussion on the impact of immigration on the financial sustainability of the welfare state.

The second group of studies has analyzed from the perspective of political economy and political sociology how different welfare regimes structure their immigration policies, focusing on the volume and profile of migratory flows. In this line of research we find two basic theoretical approaches: the theory of rights and the theory of exclusion.

The theory of rights maintains that as non-citizens gain rights, it becomes more difficult for governments to justify and implement measures that restrict the entry of immigrants (Hollifield, 1992). Countries with generous welfare states will thus have greater difficulty in imposing restrictions on immigration, resulting in their migratory flows tending to be constant or even increasing (Soysal, 1994; Jacobson, 1996). This approach is based on the notion of *natural rights*, those that are not contingent on legislation and that are universal and unchanging; therefore, the recognition of these rights for immigrants would only be a matter of time (Hollifield, 1992:28). This theory could explain the extension of social and civil rights to immigrant workers by western European countries in the post-war period. In line with this, the widespread trend toward the extension of rights has been associated with movements in favour of social and civil rights since the 1960s (Hollifield, 1992) and with the extension of human rights, as well as with the transnationalization of citizenship and the weakening of the the nation state (Soysal, 1994; Jacobson, 1996).

Proponents of a theory of exclusion, on the other hand, understand that the extension of rights that took place in Europe after the Second World War could produce the opposite effect of that argued by the theory of rights (Freeman, 1986; Gran and Clifford, 2000). Given that more rights often mean greater expenses for the state, countries that facilitate immigrant access to their social protection schemes will have a greater interest in reducing levels of immigration. These authors propose an inverse relationship between social rights and immigration that could be summarized in the approach “more rights, fewer immigrants; and fewer rights, more immigrants.”

Gran and Clifford (2000) empirically tested the hypotheses of rights and exclusion comparing access to social rights with levels of immigration in nine OECD countries. Their findings suggest that the relationship between social rights and immigration varies depending on the age of the immigrants, as the countries that provide more generous aid to families have higher levels of immigration, while those countries with more generous non-contributory pensions for the elderly permit fewer older immigrants to enter the country. As is also suggested by the findings from a comparison of the United States and Germany carried out by Wenzel and Bos (1997), states apply different migration policies (restricting or permitting higher levels of immigration) based on their social protection schemes.

The third group of studies focuses on the relationship between welfare and immigration policies and analyzes to what extent these two policy areas are complementary, or on the contrary, work in opposition. There is broad consensus about the existence of highly stable “immigration policy regimes” that determine the broad outline for immigration policy developed by each state. These “immigration regimes” consist of rules and regulations governing the possibilities of immigrants acquiring work and residency permits, participating in the economic, cultural and political life of the receiving society and becoming citizens (Faist, 1995). Such regimes are the result of specific patterns in the formation of nation-states, so that each model will have developed based on country-specific historical and organizational contingencies (Hammar, 1990). The central idea underlying the conceptualization of these regimes is that the way citizenship and nationality is understood in a specific nation-state shapes not only the rules of admission and membership in this community (immigration policy), but also the treatment and opportunities for inclusion that foreigners settled in the country receive (integration policy).

Recognizing the existence of immigration regimes, the question raised by some authors is to what extent these migratory regimes correspond to the welfare regimes previously described. In a classification constructed inductively from the comparison of various cases, Baldwin-Edwards (2002) identified a “semiperipheral” migration model, a “Schengen” model and a “Scandinavian” model that roughly correspond to the “Mediterranean,” “conservative-corporatist,” and social-democratic” welfare regimes respectively. For Soysal (1994) this relationship between welfare and immigration regimes is a question of institutional isomorphism, as the organizational policies and structures created to facilitate the

integration of the immigrant population would above all apply the institutional repertoires available in the welfare regimes of each nation state (Soysal, 1994: 36). Faist (1995) argued that each welfare model has different effects on the policies of selection, admission, and integration of immigrants so that different welfare regimes lead to the formulation of different immigration policies consistent with those regimes. In particular, the author considered social spending and the transfer of social rights to be the two most important aspects of welfare regimes for immigrants. If Baldwin-Edwards talks about correlation and Soysal about isomorphism or structural analogy between welfare and immigration regimes, Faist talks about causality, in the sense that each welfare regime will generate specific immigration policies.

Sainsbury (2006) argues that the interrelationship between welfare and immigration policy regimes would vary in space and time, producing distinctive patterns of social rights for immigrants and generating specific dynamics of mutual reinforcement or contradiction. For example, in the United States, welfare policy is in contradiction with the dictates of an inclusive immigration regime. In Sweden, on the other hand, measures based on the principle of residence principle have formed a nexus between welfare and immigration regimes. Germany offers an example of both contradiction and correspondence between regimes: on the one hand, immigration policies restrict the use of public assistance programmes for foreigners; on the other hand, employment provides a nexus between the two regimes within the complementary logic of exclusion. According to this author, there is no single, unambiguous relationship between (ideal types of) welfare and immigration regimes.

## **2.2. Principal characteristics of the Spanish welfare state**

When characterizing the nature of the Spanish welfare state, there is great debate among academic experts. While some authors consider Spain and its neighbours in southern Europe to constitute a fourth welfare regime model, the Mediterranean model (Ferrera, 1996; Moreno, 2006), others argue that Mediterranean countries are merely late-comers to the conservative-corporatist welfare regime, characterized by low levels of social protection and rudimentary institutional development (Katrougalos, 1996). Without going into the details of this debate, there is, however, widespread consensus about the particularity

of various features of the Spanish welfare system: a highly fragmented and “corporatist” system of social insurance responsible for income maintenance; key social protection programmes based on universalist principles (health care, education); the combination of public and private agents in the provision of welfare services, and the central role reserved for the family in this sphere.

As in the other countries of southern Europe, the combination of insurance schemes and universal programmes constitutes one of the specific features of the Spanish welfare regime. Today’s Spanish welfare state was founded upon the inadequate corporatist system of social provision developed under Franco, a variant of the conservative-corporatist model in place in continental Europe. Since 1977, social policies under Spain’s democratic governments have not radically restructured the pre-existing social protection programmes, but rather attempted to achieve a higher degree of universalization and coverage for these same programmes (Moreno and Sarasa, 1993:21).

But perhaps the principal characteristic of the Spanish welfare regime, as well as of its counterparts in southern Europe, is the central role played by the family in all areas of social protection (Moreno, 2009). Public authorities have taken for granted the self-sufficiency of households regarding the provision of care and material support for their members in such a way that the familisation of care has traditionally been a part of social policy (Flaquer, 2000). This has reinforced a model based on the exploitation of family resources and in particular women; this model now faces the challenge of the growing incorporation of women into the labour market and the gradual decline in expectations of solidarity within the family.

Also characteristic of the Spanish welfare regime is the high degree of decentralization regarding policy decision-making and programme management. Except in the cases of the pension system and unemployment insurance, which remain in the hands of the central government, other social protection policies are fundamentally the responsibility of the autonomous regional governments and municipal authorities. In this context, the responsibility of the central government lies in the development of basic legislation applicable nationwide, as well as in specific financial transfers of a conditional character to cover a portion of the costs of certain social protection programmes. The autonomous communities have, as a result, emerged as central political actors in the area of welfare, developing regional systems of

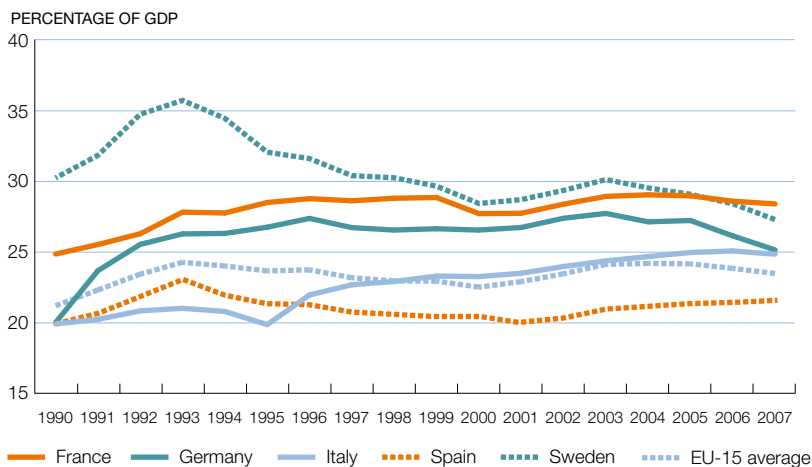
health care, education, social services and assistance and introducing considerable innovations. This means that reforms recognizing social rights end up taking distinct forms in different regions, based on the priorities established by the autonomous governments and also on the resources that can be mobilized in each region to finance such policies. On the one hand, autonomous governments serve as a laboratory for the implementation of public policy initiatives that on occasion are copied by other communities, thus generating a dynamic of expansion of social rights, as occurred in the area of income support programmes first established in the 1990s (Aguilar *et al.*, 1995). On the other hand, they adopt positions regarding reforms promoted by the central government and influence the final form of legislation adopted, as occurred in the case of long term care (Del Pino and Ramos, 2009).

Social spending in Spain also follows characteristic patterns. In comparison to the most developed countries of Europe, the Spanish welfare state is characterized by its late and incomplete development and as a result, low levels of social spending. As can be seen in graph 2.1, the percentage of GDP allocated to social spending in Spain is among the lowest of all European countries, systematically below the average for the EU-15. In 1990 Spain spent approximately 20% of its GDP on social protection, while the average for the EU-15 was 22.2%. Not only is there no evidence of a trend to reduce this difference, but in specific years it has considerably widened. Thus, in 2004 Spain spent approximately 21.2% of its GDP on social programmes, more than three percentage points less than the average for the EU-15. In 2007, the last year for which comparative data is available, the differential was once again around two percentage points. Clearly, if a comparison is made with European countries with a greater tradition of investment in social protection policies—Sweden, France or Germany—the differences are even more significant. However, as graph 2.1 shows, there has been a slow and gradual convergence in aggregate social spending patterns across European countries, with a slight upward trend in countries within the Mediterranean regime, containment in countries with conservative-corporatist regimes, and even a noticeable reduction in the case of Sweden, paradigm of the social-democratic model until the 1990s.

A detailed analysis of the disaggregated data on social spending shows, however, that it is necessary to look at the different priorities in spending on social protection programmes in order to understand how social protection regimes work in each country.

GRAPH 2.1

## Evolution of social spending in EU countries as a percentage of Gross Domestic Product (GDP)



Source: based on OECD data.

It can be clearly seen in the Spanish case (as in the other countries of southern Europe) that there is a relatively significant financial effort put into pensions, while scant resources are provided for housing or family support policies. Similarly, it is interesting to note the cyclical nature of spending on unemployment benefits, a policy area that absorbs a significant part of the financial resources dedicated to social protection in countries like Spain, characterized by a labour market that is particularly sensitive to the impact of economic cycles.

Variations in social spending between different policy areas involve a number of imbalances and tensions that produce social inequality and economic inefficiency (Guillén and Matsaganis, 2000: 121). As we will show in the following chapters, this clearly impacts on the relationship between immigration and the welfare state, affecting the role of immigrants as users and agents in the system, as well as the consequences of immigration on the system's financial sustainability.

TABLE 2.1

**Breakdown of social expenditures as a percentage of GDP**

		1990	2000	2007
UE-15	<b>Total</b>	<b>20.62</b>	<b>23.41</b>	<b>24.34</b>
	Retirement	7.15	7.78	7.91
	Unemployment	1.48	1.28	1.21
	Family	1.95	2.20	2.35
	Healthcare	5.35	5.75	6.57
	Housing	0.36	0.40	0.39
France	<b>Total</b>	<b>24.87</b>	<b>27.72</b>	<b>28.40</b>
	Retirement	9.21	10.50	11.06
	Unemployment	1.67	1.45	1.36
	Family	2.50	3.02	3.00
	Healthcare	5.83	8.07	7.85
	Housing	0.75	0.88	0.76
Germany	<b>Total</b>	<b>20.05</b>	<b>26.56</b>	<b>25.16</b>
	Retirement	8.67	8.78	8.65
	Unemployment	0.78	1.34	1.38
	Family	1.52	2.05	1.83
	Healthcare	3.55	4.73	5.86
	Housing	0.13	0.32	0.61
Sweden	<b>Total</b>	<b>30.23</b>	<b>28.43</b>	<b>27.30</b>
	Retirement	8.55	8.25	6.54
	Unemployment	0.86	1.38	0.67
	Family	4.42	2.95	3.35
	Healthcare	4.86	5.52	6.84
	Housing	0.64	0.62	0.47
Spain	<b>Total</b>	<b>19.95</b>	<b>20.44</b>	<b>21.58</b>
	Retirement	7.22	9.08	8.98
	Unemployment	3.16	1.98	2.12
	Family	0.32	0.97	1.23
	Healthcare	7.41	6.25	6.58
	Housing	0.11	0.17	0.18

Source: based on OECD data.



### 2.3. Principal characteristics of immigration in Spain

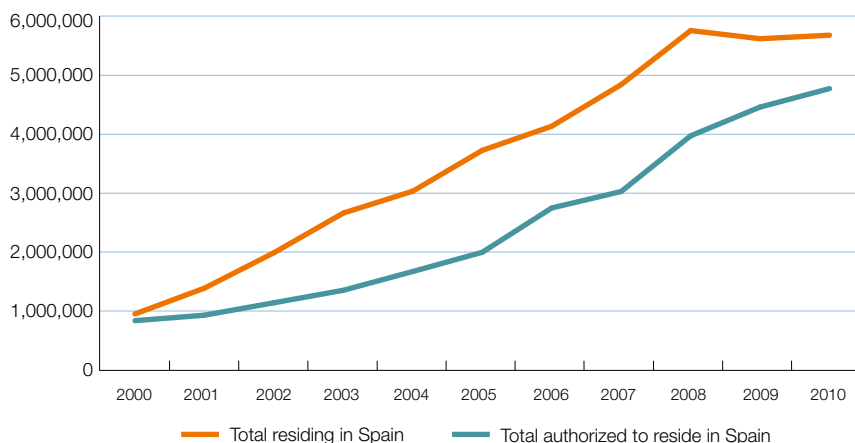
Before analyzing the relationship between immigration and the welfare state in Spain we must clearly define the population which is the object of this study, specifying the different groups of foreign residents which we refer to throughout the book. The more than six million foreigners currently residing in Spain are not a homogeneous group with the same characteristics and living conditions. On the contrary, it is possible to divide this group into at least four main categories: citizens of other EU-15 countries (primarily retired persons, medium and highly skilled workers, and students); citizens from non-EU western developed nations; citizens of Eastern European countries that have joined the EU since 2004, and finally, a broad mix of individuals from developing countries. Our study is primarily focused on the third and fourth groups as they fit into the category of “economic immigrants” in the Spanish collective imaginary. Moreover, as will be analyzed in chapter three, immigrant origin (particularly whether one is from the EU or not) has a great influence on legal status in Spain and therefore, on the degree of incorporation into the labour market and rights of access to social protection systems.

The available statistical data on which our analysis is based does not always make it possible to differentiate these two groups from other foreign residents in Spain. When it is not possible to refer only to these groups we will make this explicit, attempting then to compare the situations of the different categories of foreigners that we can identify with those of the autochthonous population.

The migratory process experienced by Spain in recent decades has certain unique features. One primary characteristic is the extraordinary volume and intensity of migratory flows to Spain and the sharp increase in the foreign resident population, particularly in the past decade. Spain has gone from being a country of emigration to being a net recipient of migratory flows (Izquierdo, 2006). According to aggregate data from municipal population registers, there were 923,000 foreign residents in Spain in 2000 out of a population of 40.4 million. Ten years later (in December 2010), this figure had increased to slightly over six million foreign residents out of an overall population of 45 million. In other words, in the past decade foreign residents have gone from representing 2.28% to 12.17% of the total population in Spain.

GRAPH 2.2

## Evolution of the number of foreigners residing in Spain and the number of authorizations to reside in Spain



Source: based on data from the Ministry of Labour and the INE.

However, the number of foreigners who reside legally in Spain has always been below the figures supplied by municipal population registers. Graph 2.2 makes it possible to compare data from these population registers with Ministry of the Interior data on the number of foreigners with authorization to reside in Spain. Hence, we can see that in June 2010 slightly more than 4.7 million foreigners had residency permits, compared to the slightly more than six million listed in municipal population registers.

There is no doubt that there are undocumented immigrants residing in Spain, but it is not possible to accurately determine how many of them there are. The difference between the figures from population registers and the Ministry of the Interior clearly suggests that there are more immigrants residing in Spain than are counted by the Ministry. But it also seems plausible that there are fewer immigrants than are listed in municipal population registers, given that the registers do not provide an accurately updated record of individuals who have left a specific municipality or

even the country.<sup>(1)</sup> As will be seen in greater detail in the next chapter, from the perspective of an undocumented immigrant, there is a dual incentive to register in a municipality: being registered entitles one to certain social services (in particular, to education, health care and housing under equal conditions with respect to Spanish citizens) and moreover, constitutes proof of settlement that can then be used in the process of regularizing legal status. The figures from municipal population registers give us an idea of the number of foreigners residing in the country; although they tend to provide an overestimation.

The number of undocumented immigrants residing in Spain has fluctuated, on the one hand, in response to specific factors and historical contexts in the countries of origin of immigration (for example, the exchange rate crisis in Ecuador in 2000 and the ‘corralito’ in Argentina in 2001 - the name given to the economic measures taken by Argentina’s government in freezing bank accounts and withdrawals from US dollar accounts). On the other hand, the Spanish government has resorted to a series of extraordinary regularization programmes to reduce the number of undocumented migrants: 1991 (116,000 undocumented immigrants regularized); 2000-2001 (220,000 regularized); 2002 (240,000 regularized) and 2005 (580,000 regularized). The law also provides a regularization mechanism based on establishing a certain level of social integration (*arraigo social*) available after three years of residency in the country without papers; this constitutes a sort of quasi-automatic mechanism that maintains the volume of undocumented immigrants within certain limits, while offering undocumented migrants the chance to escape from the insecurity and vulnerability resulting from their illegal status.

It should also be noted that often it is the legislation itself which creates irregularity by making it difficult for immigrants to renew work and/or residency permits by demanding requirements which are difficult to meet in the context of an economic crisis with high levels of unemployment and job insecurity such as we find in Spain today. As we shall see, the existence of immigrant groups in situations of administrative irregularity has important consequences

(1) The process of registering as a resident in a municipality is sometimes done by family members or friends of an individual who does not reside in Spain, with the aim of accumulating time as a resident before actual migration. In light of the removal of almost 500,000 non-EU immigrants from municipal population registers in the summer of 2006, Fernández Córdón pointed out that “a considerable number of foreigners registered as residents in reality do not live in Spain, and as a result it follows that the number of undocumented immigrants does not reach the levels that are currently being considered (between 700,000 and 1.6 million)” (*El País*, 23-08-2006).

for their social integration, largely determining their relationship to the welfare state and economic system as a whole.

Of the 4.7 million foreigners with legal residence in Spain in June 2010, slightly more than 48% belong to the European Community regime (in other words, European citizens with the same civil and social rights as Spanish citizens and in addition, with specific political rights -the right to vote and run in local elections and for the European Parliament), while the rest belong to the general regime (immigrants from outside the EU). As can be seen in Table 2.2, from 2000 to 2010, there was a significant increase in all groups of foreign residents in Spain, but the total for all non-EU immigrants made those falling under the general regime the majority beginning in the year 2000.

European integration has facilitated the mobility of European citizens within the EU common space. This has translated into a significant number of community nationals coming to reside in Spain - particularly from the United Kingdom, Germany, Italy, Portugal, France and the Netherlands. The expansion of the EU into eastern Europe has ended up including under the umbrella of the community regime a large number of economic immigrants proceeding from new member countries (Romania, Poland and Bulgaria primarily). The Romanian community has in fact tripled during the past decade, becoming since 2008 the largest foreign group. In addition to Europeans, the other large immigrant groups are Moroccans because of geographic proximity and Latin Americans because of language and cultural ties.

TABLE 2.2

### Evolution in the number of foreigners residing in Spain by geographic origin

NATIONALITY	1998	2000	2002	2004	2006	2008	2010
Rest of the EU	277,845	375,487	489,813	636,037	918,886	2,102,654	2,346,515
Rest of Europe	29,772	47,209	202,411	404,643	690,970	731,806	226,379
Latin America	117,868	189,464	730,459	1,237,806	1,500,785	1,758,295	1,741,179
North America	14,286	17,374	22,104	24,613	27,292	26,595	28,250
Africa	147,875	228,972	423,045	579,372	785,279	909,757	1,048,909
Asia and Oceania	44,719	57,811	100,688	144,748	220,281	259,133	317,194
<b>Total</b>	<b>632,624</b>	<b>916,730</b>	<b>1,969,107</b>	<b>3,027,800</b>	<b>4,144,166</b>	<b>5,788,797</b>	<b>5,708,940</b>

Source: Continuous Municipal Register files, INE.

In January 2009, Romanians represented 14.1% of the total foreign population, followed by Moroccans (12.7%), Ecuadorians (7.5%), and UK citizens (6.7%). These four groups combined represented 40% of the foreigners registered in Spain.

When analyzing data from the Ministry of the Interior in order to study the foreign-born population living in Spain, it should be noted that this data does not include those who obtain Spanish nationality through one of the mechanisms in the Civil Code. Until only a few years ago this phenomenon was of minor importance, but with the arrival of greater numbers of Latin American immigrants who are eligible to obtain nationality after only two years of legal residency in Spain (instead of the ten years required for the majority of foreigners) it has become more important; today approximately 100,000 people are granted Spanish nationality annually.

A similar situation is occurring in the case of second generation immigrants (actually born in Spain) who are able to acquire Spanish nationality more easily (Martin and Moreno Fuentes, 2010) as they do not appear in immigration statistics or quickly disappear from them. The significance of this lack of data with respect to these groups lies in the fact that it is much more difficult to study the inequalities affecting them because of the difficulty in tracing them statistically.

The foreign population is not uniformly distributed throughout Spain but tends to be concentrated in certain regions and within these regions, in certain provinces. Broadly speaking, the distribution reflects the geography of economic development, with a high degree of concentration on the Mediterranean coast and in the Community of Madrid. Thus, Catalonia (20.9%), Madrid (18.7%) and the community of Valencia (15.5%) combined account for 55.1% of the foreign population in Spain. If we add Andalusia, then 67.3% of the resident foreigners in Spain are concentrated in only four of Spain's 17 autonomous communities.

TABLE 2.3

**Citizenship naturalizations by geographic region of origin**

YEAR	TOTAL	AMERICA		EUROPE		AFRICA	ASIA	OTHERS
		LATIN	NORTH*	UE	NON-EU**			
1995	6,750	4,053	111	616	53	1,059	818	40
1996	8,411	5,410	119	688	59	1,029	1,080	26
1997	10,293	6,204	176	846	81	1,471	1,486	29
1998	13,165	8,024	223	1,137	103	2,149	1,480	49
1999	16,373	10,063	302	1,168	150	2,880	1,756	54
2000	11,996	6,893	254	828	122	2,575	1,283	41
2001	16,735	9,447	395	1,043	192	3,824	1,787	47
2002	21,805	13,382	496	1,226	191	4,325	2,131	54
2003	26,556	13,954	457	1,252	193	8,522	2,122	56
2004	38,335	23,813	573	1,426	295	9,991	2,198	39
2005	42,829	31,290	540	1,146	307	7,346	2,164	36
2006	62,339	50,254	692	1,037	397	7,618	2,303	38
2007	71,810	56,741	725	1,135	445	10,312	2,418	34
2008	84,170	67,443	912	1,404	490	11,201	2,684	36

\* Except Mexico, which is included under Latin America.

\*\* Data from the EU calculated from the members states in each year (including therefore Romania and Bulgaria starting in 2008).

Source: based on data from the *Dirección general de Registros y Notariado*, Ministry of Justice.

If we look at foreigners as a percentage of the total population in each autonomous community, the following communities have the highest concentration of immigrants: the Balearic Islands (21.8%), Valencia (17.3%), Madrid (16.6%), Murcia (16.4%), and Catalonia (15.9%). These communities reveal the dual nature of the presence of immigrants in Spain: on the one hand, the non-EU immigrant population, concentrated primarily in the areas with the highest demand for foreign labour; on the other, residents from other countries of the EU, many of them retired and living along the coast or settled primarily in the large cities, where there are greater professional opportunities.

TABLE 2.4

### Distribution of foreign residents by Autonomous Community (1 January 2010)

AUTONOMOUS COMMUNITY	NO. OF FOREIGNERS	PERCENTAGE OF THE POPULATION
Andalusia	698,375	8.36
Aragon	172,015	12.79
Asturias	49,149	4.53
Balearic Islands	241,704	21.87
Basque Country	139,229	6.39
Canary Islands	305,661	14.45
Cantabria	39,010	6.59
Castilla-La Mancha	228,290	10.89
Castilla y Leon	167,597	6.56
Catalonia	1,193,283	15.90
Extremadura	38,747	3.50
Galicia	109,222	3.91
La Rioja	46,342	14.40
Madrid	1,071,292	16.62
Murcia	240,605	16.48
Navarra	70,931	11.15
Valencia	884,622	17.35
Ceuta	3,993	4.96
Melilla	8,873	11.67
<b>Total</b>	<b>5,708,940</b>	<b>12.16</b>

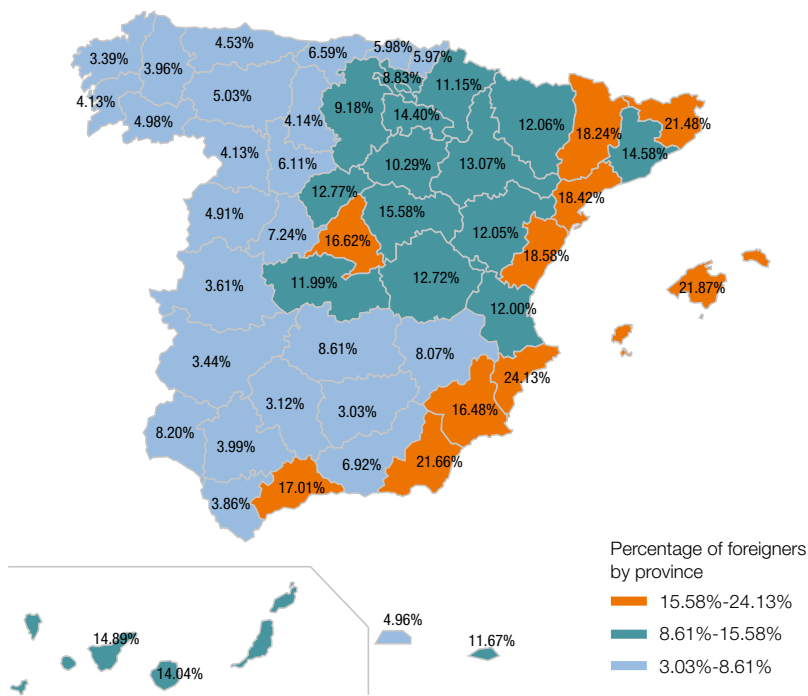
Source: based on data from the INE.

In addition to this dual distribution of the immigrant population based on country or region of origin and different reasons for settling in Spain, we can also identify clear patterns in the choice of place of residency by different groups of foreign residents. Romanians primarily settle in Madrid and Castellon, while Moroccans tend to settle in Catalonia and the eastern part of Andalusia. Latin Americans are more concentrated in Madrid (working in construction and services) and in Murcia (in agriculture); Pakistanis reside mostly in Barcelona and Algerians in Alicante. These settlement patterns can be explained by a combination of the type of demand for labour predominant in each of these zones (the Spanish labour market is highly segmented by nationality and sex) and by the influence of migratory networks formed by migrants already settled in an area. Retirees from the EU residing along the Mediterranean

coast, in the Balearic and Canary Islands have settled in these areas looking for a better climate and have also to some extent followed the logic of residing in national enclaves, which on a different scale and different level of intensity replicate the patterns of concentration found among economic immigrants. As will be analyzed later, this concentration of the immigrant population in certain regions has significant impact on public services in general and on welfare state programmes in particular.

GRAPH 2.3

### Distribution of foreign residents by province (1 January 2010)



Source: based on data from the INE.

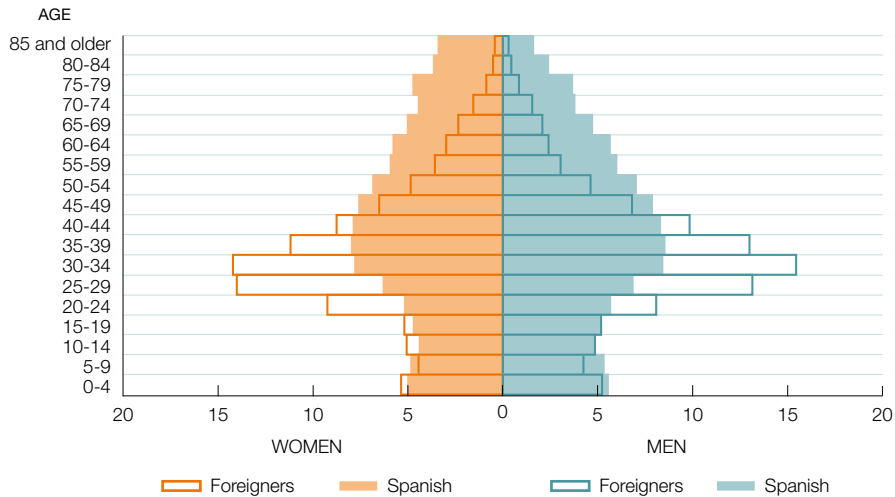
Another distinguishing characteristic of the immigrant population in Spain is its age distribution; immigrants are significantly younger than the native-born population. According to Eurostat data, the average age of foreign residents in the EU-27 in 2009 was 34.3 years of age, compared to an average of 41.2 years



of age for Europeans. Spain is no exception to this rule, as the average age of foreign residents is 32.6 years of age, well below the average age of 41.4 for Spanish nationals.

GRAPH 2.4

**Comparison of population pyramids of the population residing in Spain by nationality, sex and age (1 January 2010)**



Source: based on data from the INE.

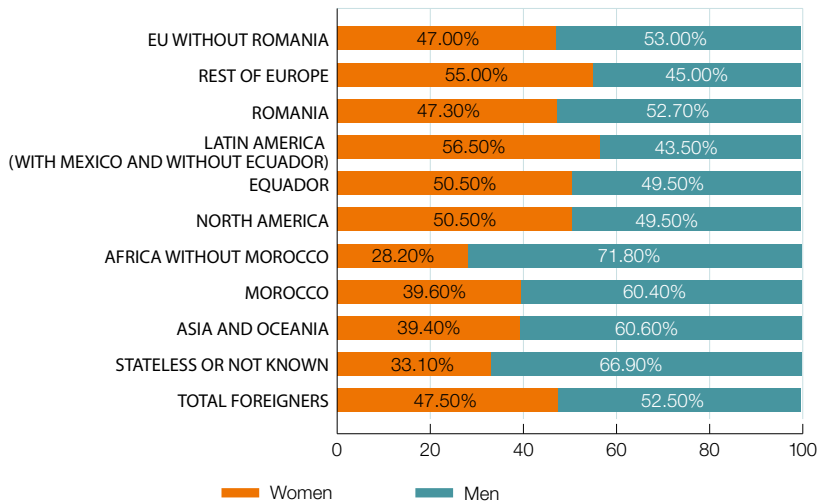
A comparison of population pyramids for the native-born and foreign population in graph 2.4 shows that the majority of foreigners settled in Spain are in the 20 to 40 year old age range; in other words, clearly concentrated within the working age population. The groups with more members at working ages are Moroccans, Ecuadorians, and Romanians. In contrast, foreigners from EU countries are clearly older, with 18% over 65 years of age. Although the Portuguese, Greeks and Italians are primarily young, as corresponds to work-related migration, other groups such as the British, Germans, Scandinavians, Swiss and Belgians are clearly older, corresponding to what is known as international retirement migration. The British and Germans are the most numerous among retirees residing in Spain. These two population age structures reflect the two typical immigrant groups from Western Europe in Spain: those who

come “to relax” or enjoy their retirement and workers who are skilled and highly skilled (Kuehn, 2009).

We can, therefore, conclude that economic immigration is contributing to the rejuvenation of the Spanish population and as will be analyzed in detail later, the demographic structure of this immigration reveals that immigrants will be net contributors for at least the next two decades.

GRAPH 2.5

**Percentage of foreigners residing in Spain by sex and origin (1 January 2010)**



Source: based on data from the INE.

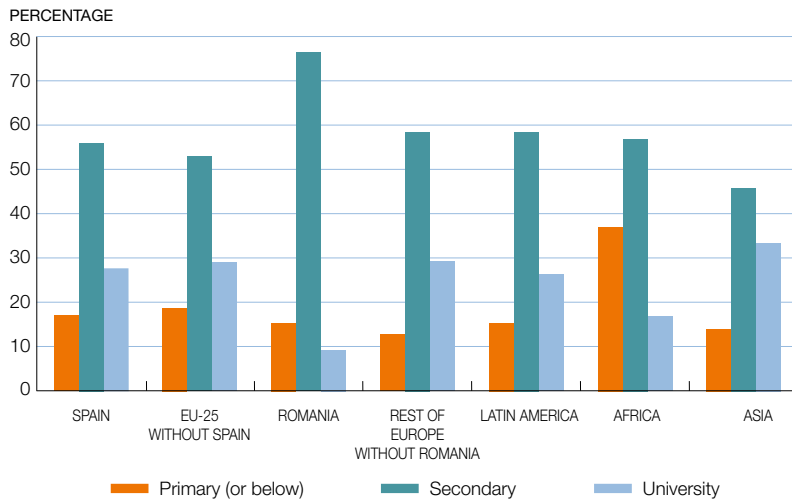
The distribution of the foreign population in Spain by sex also reveals specific characteristics. Overall, there is a slight predominance of men as a result of the primarily work-related and economic character of immigration to Spain and the segmentation of the labour market.

This masculine profile of immigration is clearly visible among African and Asian immigrant groups as well as among certain Latin American groups. However, among Romanians, Ecuadorians and Dominicans, the high proportion of women who decide to migrate on their own and not simply follow a male

head-of-household has contributed to the feminization of immigrant groups from these countries. Thus, between 2000 and 2010 we can see a rising female presence in the immigrant population because of the relatively feminized migration flows from Latin America. In addition to the willingness of these women to emigrate, leaving their families behind, the phenomenon that explains the feminization of immigration is the existence of an employment niche in domestic and personal care services, highly segmented by sex. The acceleration of the family reunification process has also contributed to a greater balance between the sexes among immigrant groups.

GRAPH 2.6

### Maximum accredited studies



Source: based on data from the *Encuesta Nacional a Inmigrantes 2007*.

The fact that economic immigrants occupy the lowest rungs of the labour market has contributed to the image of an immigrant population with low levels of education. As graph 2.6 shows, the reality is somewhat more complex.

The bibliography on the links between education level and migration shows that those who decide to emigrate are generally among the better educated from their society of origin (Beauchemin and Gonzalez, 2010). The reasons for this are clear. Emigration constitutes a difficult and challenging enterprise

demanding all types of capital (economic, cultural, relational, social, etc.); the better educated are also generally better prepared to meet these costs. This implies that although a specific immigrant group may have a relatively low education level in comparison to the autochthonous population of the receiving society, in general they constitute a selection of the best educated from their country of origin. Based on a 2007 survey from the National Statistics Institute (NSI - Instituto Nacional de Estadística)<sup>(2)</sup> we can analyze the education profiles of different groups of immigrants in Spain and compare them with the native-born population. Thus, we can see that the only foreign group with a lower education profile than the autochthonous population is the immigrant population from Africa, as the proportion of African immigrants who have primary school education or lower is twice that of the Spanish population, and the proportion who have some type of higher education is half that found among the Spanish. With a different breakdown among the different education levels, all the other immigrant groups reveal higher levels of education than the native-born. Three-fourths of the Romanians residing in Spain have secondary education, compared to a little over 55% in the case of the Spanish. Latin Americans present a profile with a slightly lower percentage of individuals with higher education, but with a slightly higher percentage in terms of secondary education and fewer with just a primary school education. The percentage of those with accredited higher education is also higher among Asians and Eastern Europeans. In short, we can conclude that foreigners who have settled in Spain generally have a higher level of education than the native-born Spanish.

## 2.4. Immigration and the labour market

Without minimizing the role played by other undoubtedly important elements, the primary explanation for the decision to emigrate is economic (Massey *et al.*, 1993).<sup>(3)</sup> As pointed out in economic analyses of migration, migratory flows are to a large extent explained by the existence of an imbalance in terms of wages

(2) This survey is the first statistical tool specifically designed by the National Statistics Institute to provide greater knowledge about the new population residing in Spain.

(3) Other disciplines in the social sciences have included other factors to explain migratory flows and establish their relative autonomy from economic cycles. These include, among others: the importance of social networks, political and institutional constraints, the role of historical connections between sender and receiver countries and environmental factors.

and capital available between sender and receiver countries. The large wage differential and employment opportunities in the receiver country are therefore among the most important factors in explaining the decision to emigrate. The “call effect” exists, and it is directly related to potential migrants’ expectations of finding a job in the receiving country. Starting from this basic understanding, the contribution of other approaches such as analyses of labour market segmentation (which explain how unemployment and demand for labour power in specific economic niches can exist simultaneously in receiver countries), the “new migration economy” (in which the basic unit of analysis in the process of deciding to migrate is not the individual but the family), or finally “global migration systems theory” (which highlights the need to analyze the economic systems of different countries within the context of the global capitalist system) together make up the central focus of economic analysis of migratory processes.

Immigrants arriving in Spain from developing countries have found employment primarily in sectors with a high concentration of jobs not covered by local workers and thus with a demand for labour. The compatibility of this process with an unemployment rate substantially higher than the European average and a relatively low economic activity rate, even in periods of strong economic growth, can be explained primarily by labour market segmentation resulting from the increased expectations of the Spanish population. During nearly three decades of economic growth, which began in the mid-1980s, the Spanish population has come to reject certain types of jobs because of their low pay and/or difficulty while at the same time revealing little willingness for geographical or functional mobility. Many economic activities that have survived mainly thanks to the intensive use of manpower, low salaries and job insecurity, have been carried out by immigrant workers who have contributed in this way to the survival of certain productive sectors that would otherwise have disappeared.

Between 1996 and 2007 the Spanish economy created almost eight million jobs, expanding from 12.6 million employed in 1996 to 20.5 million in the second quarter of 2007. This represented more than 40% of all the employment generated in the OECD in that period. After this peak in employment, the global economic crisis, which has had a tremendous effect on the Spanish economy, has led to the destruction of more than two million jobs. Immigrant workers, who played a key role in this whole process, making up a large share of the new workers employed during the boom, have now taken on a disproportionately

high share of the cost in the form of unemployment. With their incorporation into the Spanish labour market, immigrant workers have contributed to the introduction of flexibility (in terms of hiring, working conditions, salaries and geographic and functional mobility), particularly in certain sectors and employment niches; however, at the same time, they have also provided a “buffer” from the most negative effects of the crisis for Spanish workers.

At the end of 2001, the number of foreigners affiliated to the social security system was around 600,000 (a little less than 4% of affiliated workers). By the end of 2007 that number had increased to almost two million foreigners contributing to the coffers of the National Institute of Social Security (*Instituto Nacional de la Seguridad Social*, INSS) (10.3% of total affiliates). Despite the economic crisis, which has affected foreign workers with particular intensity, at the beginning of 2010 the number of foreigners affiliated to social security continued being close to 1.9 million people (around 10.5% of affiliated workers).

TABLE 2.5

**Distribution of the foreign population by social security regime affiliation (November 2009)**

REGIME	EU FOREIGNERS	NON-EU FOREIGNERS	TOTAL FOREIGNERS	TOTAL
General	429,545	803,946	1,233,490	13,433,108
Self-employed	109,694	89,405	199,099	3,165,517
Agrarian	110,845	139,446	250,291	818,319
Sea-workers	1,040	3,825	4,865	54,530
Domestic	22,187	152,703	174,890	289,432
<b>Total</b>	<b>673,986</b>	<b>1,189,358</b>	<b>1,863,344</b>	<b>17,777,153</b>

Source: based on data from the INSS.

As can be seen in the over-representation of immigrants in the agrarian and domestic regimes (table 2.5), the Spanish labour market acts as a clear mechanism for the segmentation of employment by sex, nationality and area of economic activity. And it is precisely this segmentation that explains to a large degree the differential impact of unemployment on different groups of foreign workers. In the last quarter of 2010 foreigners continued to represent 9.3% of the workers in the general regime, 7.5% of the sea workers, 6.3% of

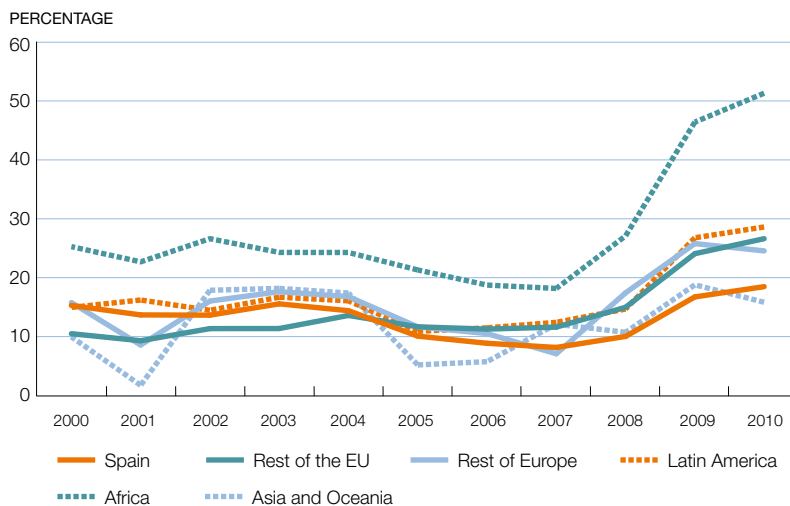
self-employed workers, 41.2% of those affiliated with the agrarian regime and more than 60% of those inscribed in the regime for domestic workers.

Those immigrant groups working in the sectors most affected by the crisis have suffered the most serious consequences in terms of unemployment, while other groups have been comparatively less affected. As can be seen in Graph 2.7, the biggest losers have primarily been African immigrants (Sub-Saharan as well as Moroccan, both with unemployment levels around 50% in the second quarter of 2010), a group that is mostly men and traditionally employed in construction, agriculture, and in low-skilled jobs in the service sector. Latin American immigrants have unemployment rates between 25 and 30%, substantially higher than that of Spanish workers (around 18%), but considerably lower than that found among African workers. The explanation for their intermediate position can be found in the much higher proportion of women in this group, who as a result of being employed in the area of personal services have been less affected by the employment crisis. Finally, Asian immigrants have unemployment levels slightly lower than that of Spanish workers, which is connected to the greater propensity of these groups (especially Chinese, but also Pakistanis) to work within their own communities and in ethnically based business initiatives (in retail, restaurants, etc.) (Sole *et al.*, 2007).

GRAPH 2.7

## Evolution of the unemployment rate by worker's geographic region of origin

Data from the second trimester of each year



Source: based on data from the Economically Active Population Survey.

A significant proportion of jobs for immigrant workers are found in the underground economy (Círculo de Empresarios, 2010). Because of their nature, escaping regulatory controls and taxation, the precise dimensions of these economic activities are unknown, although various estimates calculate them to account for between 20 and 23% of GDP (Alañon and Gómez, 2004). These estimates would place Spain, along with Greece and Italy, among the countries of the OECD with the largest underground economies, the average for OECD countries being approximately 14% in 2010 (Schneider, 2010). This informal economic activity is concentrated primarily in agriculture, construction, certain manufacturing sectors (textiles, shoes and toys) and particularly in the service sector (restaurants, cleaning, domestic services and the provision of care) (Baldwin-Edwards and Arango, 1999).

Participation in the underground economy constitutes the only possibility of employment for undocumented immigrants, as well as for other immigrants who may have work permits but are unable to find work in the formal economy.



In addition to poor working conditions, workers employed in the underground economy do not contribute to social security and are therefore excluded from contributory social insurance systems, increasing their vulnerability to life cycle risks associated with employment. Aware of this situation, in recent decades, the Spanish government established different mechanisms aimed at regularizing the situation of undocumented immigrants. For policy makers these regularization processes are a response to the loss of tax revenue and unfair competition from businesses that do not make contributions to social security for their workers and that as a result, have lower labour costs.<sup>(4)</sup> The utilization of annual quota systems and regularization based on long-term settlement (*arraigo*) are mechanisms established by the government to reduce the number of immigrants in the underground economy (Moreno Fuentes, 2005).

Despite the current economic crisis with its high attendant unemployment among foreign workers, immigrant labour has become a structural component of the Spanish labour market (Oliver, 2006).

## 2.5. Conclusions

Departing from a situation of underdevelopment and great institutional weakness, in the 1980s the Spanish system of social protection began a process of relatively rapid convergence with the welfare regimes of other European countries. The universalization of certain basic social rights (education and health care) and the development of programmes responding to life cycle risks (retirement, disability, etc) have led to the consolidation of a welfare regime similar to that found in other countries of southern Europe. This balance of responsibilities and functions in the area of welfare between the state, the market and civil society has not been fully developed and now faces a dual challenge of great importance: first, the questioning of its viability in an increasingly globalized economy based on premises that are ideologically hostile to the existence of a welfare state that guarantees social rights; and secondly, confronting the rapid transformation of the social and demographic

(4) The last two regularization processes (2000 and 2005) were particularly important, as they regularized 630,000 and 690,000 undocumented immigrants respectively. The last one transferred responsibility for the process to employers with the aim of generating legal work contracts and in this way increasing contributions to social security. Thirty two percent of the applications for regularization in 2005 were for the domestic service and caregiving sector; 21% were for construction; 15% for agriculture and 10% for the restaurant and tourism sector.

structures on which this balance was based (ageing, changes in family structure, redefinition of gender roles, etc).

In this context, the arrival of immigrants in Spain, attracted by an economic growth pattern based to a large extent on the availability of flexible low-skilled labour, has been a challenge and at the same time a boost for the existing system of social protection. On the one hand, the immigrant population has called into question the premises on which the eligibility and deservingness criteria of the Spanish welfare state have been based, while its demands for benefits and services have increased; on the other hand, immigrant labour has transformed the structures for the provision of care as part of a complex process of change in the pattern of allocation of responsibilities within families. The integration of these workers and their families is one of the most important challenges that Spanish society will face in the coming decades. In this process, the welfare state will play a central role and the study of the relationship between immigration and the system of social protection therefore constitutes a critical issue. In the following chapters we will analyze in detail this relationship, pointing out its main characteristics as well as the precise nature of the challenges to be addressed.

## III. The access of immigrants to social benefits

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The first issue that we want to explore in the relationship between migration and the welfare state is immigrant access to social protection benefits and services. The breadth and depth of protection they have access to is defined by both their legal situation (linked to immigration policies) and the nature of the welfare regime (associated with the deservingness principle upon which the social rights recognized by the regime are based).

### 3.1. Citizenship and social rights

The access of the immigrant-origin population to social protection systems in receiving countries has been an issue of great academic debate. Some authors argue that national welfare states, by their very nature, constitute closed systems with clearly defined borders, which define who the members of the community are and, therefore, the beneficiaries of its protection (Freeman, 1986: 52). Linking the right of access to social protection schemes with ‘belonging’ to a national community is consistent with the previously discussed theory of exclusion. Supporting this hypothesis, the arguments for the creation and expansion of social protection systems have generally been framed within a rhetoric of ‘national solidarity’ and/or ‘citizenship rights’ (Brubaker, 1992).

In opposition to the vision of European welfare states as inherently exclusive systems are the arguments of those authors who advocate a theory of rights. According to these authors, states have been considerably receptive to incorporating populations of foreign origin into their systems of social protection, extending their coverage to the entire resident population (although they have done so at different rates). Such inclusion can essentially be

explained by the translation of international agreements and conventions for the protection of human rights into the legislation of individual states (Soysal, 1994; Jacobson, 1996); and in addition, by the role played by courts in the defence of individual rights (Joppke, 1999: 39) or by the actions of bureaucrats with the responsibility for implementing social programmes (Guiraudon, 2000:17).

The reality seems to lie somewhere in between these two positions. Although universalist arguments are correct regarding the extension of civil and social rights to a significant number of foreigners with permanent permission to reside and work in their host country, it is also true that this group constitutes only a part of the total number of resident foreigners. Thus, while some categories of non-nationals have full access to social protection systems with the same rights as nationals, other groups (undocumented immigrants, tolerated refugees, asylum applicants, etc.) have been, implicitly or explicitly, partially excluded from these systems. In addition, as the work of Morissens and Sainsbury shows (2005), there are great differences in the same state between the social rights of citizens and immigrants with legal residency; according to the authors, these differences are even greater in the case of immigrants who have darker skin than the autochthonous population.

Differences between states in this respect are also considerable, reflecting different processes in the institutionalization and extension of social rights and the regulation of nationality and citizenship (Marshall, 1964). Regarding this, Sainsbury (2006) shows that non-citizens enjoy greater rights in broad welfare states (such as Sweden and Germany) than in incomplete welfare states (such as the United States), explained by the different nature of their welfare regimes. Along similar lines, Dorr and Faist (1997) argue that the essential difference between countries regarding the socioeconomic integration of immigrants lies in the institutional framework of their welfare regimes. According to these authors, rights of residence in fact play a similar role in all the countries they studied, given that in all of them immigrants are classified into equivalent entry categories with similar rights.

### 3.2. Deservingness and rights of access to welfare regimes

Esping-Andersen's typology of welfare regimes (1990) is a useful starting point to analyze the normative premises determining criteria of deservingness (who deserves protection) and right of access (the requirements and procedures to access benefits and services) to social protection systems in receiving societies are based.

The social protection schemes of European countries have been established through a historical process conditioned by economic, social and political factors specific to each country. Social democratic welfare regimes, typical of Scandinavian countries, developed out of a universalist philosophy based on the extension of individual social rights and on the central role of the state in the redistribution of wealth. According to these principles, the welfare state acts as one of the primary mechanisms for social equality. These regimes, the result of an alliance between different social classes, arose in societies with high levels of ethnic homogeneity and a strong sense of collective belonging with the aim of protecting the members of the 'national community'. The extension of social rights was based on 'residing' within the territory of the country. This has led to addressing immigration with a combination of strict surveillance of external borders (to control the number of resident foreigners) and internal controls over access to social protection systems (to verify the 'legality' of residence). This way of defining rights of access to social benefits has meant that the issue of immigration has traditionally occupied an important place in the political agenda of these countries. In addition, this welfare regime model has a significant impact on the economy of these countries in terms of salaries, production model, labour relations, and more specifically, in regards to the labour market in the welfare sector. These are states with high levels of public employment basically held by autochthonous women and with little margin for informality.

Conservative-corporatist social protection regimes, typical of the central European countries, emerged out of old guild traditions and were structured around the principle of income maintenance. Participation in the labour market and affiliation to contributory social insurance systems guarantee access to basic social benefits for the contributor and his/her family so that they are able to face the risks that are part of the life cycle (illness, dependency, ageing). In this model, the strength of social protection is linked to the socio-

professional category of the worker and is independent of his/her nationality. As a result, immigrants legally residing in the host country acquire the right to social benefits based on their participation in the formal labour market and under the same conditions as the native-born population. In these types of regimes, immigrant access to social benefits is not very problematic from a political perspective as rights to access to these programmes depend on participation in the labour market, which leaves little room for the appearance of a sense of 'grievance' or of 'unfair competition' for welfare state resources. However, the establishment of public insurance schemes to expand social protection to groups excluded from the social insurance system (through minimum income schemes, non-contributory pensions, etc.) increases the space for the introduction of this issue into the political agenda. With the introduction of these schemes, the issue of foreigners' access to social protection programmes becomes controversial and politicized to the degree that such programmes are perceived to be based on 'national solidarity'.

The liberal welfare regime, in western Europe only represented by the United Kingdom, is based on the individual being responsible for his/her own well-being. Under this regime, the central role of covering risks throughout the life cycle (receiving an income after retirement, etc.) is assigned to the market with the state playing only a secondary role. The market is considered the most efficient mechanism for allocating resources, and the state is expected to intervene only to resolve the most serious problems caused by 'market failure'. In this model, many social protection programmes are based on the principle of 'means testing'; in addition to meeting only the most basic needs of the most disadvantaged populations, this attaches a strong social stigma to these programmes, making them potential objects for political mobilization. In this context, the expectation is that the immigrant origin population, like the native-born population, will rely on the market for protection from risks and to obtain needed services. Social protection programmes aimed at persons in situations of exclusion are based on a tradition of locally organized charity. These programmes refer more or less explicitly to 'community' solidarity, which makes those populations whose community membership is questionable particularly vulnerable. As a result, the stigma associated with such programmes combined with the issue of immigrant access to them (often labelled as

‘abuse’) makes the relationship between immigration and the welfare state a particularly important political issue.

The fourth welfare regime model is the Mediterranean type found in Spain and other southern European countries. This type of regime combines both social insurance programmes (pensions, unemployment benefits) and programmes of a universalist character (education, healthcare and, to a lesser extent, personal social services) with a traditional dependence on the family as the principal provider of care and attention to its members (Ferrera, 1996; Moreno, 2006). Under this regime, immigrants have access to social protection in two main ways. On the one hand, foreigners with permission to work access these systems under the same conditions as native born workers through social insurance based on participation in the labour market and affiliation in the social security system (as in the conservative-corporatist regime). On the other hand, immigrants have access to certain social protection based on residing in the country, in other words, access to programmes of universal social protection. In Spain, this would be the case with healthcare, education, some social service programmes and housing assistance – residency providing the right to benefits regardless of an individual’s legal situation. This dual character of the criteria defining rights of access also defines the space for the politicization of the issue of immigrants’ access to social protection systems. Thus, access to benefits through insurance systems – in which, as we will see, immigrants are net contributors – leaves little room for the political manipulation of attitudes of “competition” or “displacement” among the native-born population. In contrast, programmes of a universal character with rights to access based on residency, such as healthcare or other social services, are more likely to lead to anti-immigrant feelings, as in some cases and some geographical areas situations of competition or at least the perception of competition over scarce resources may arise.

### **3.3. The access of immigrants to social protection systems**

As we have seen, participation in the formal labour market largely determines the social rights of immigrants in Spain through their affiliation to the social security system. At the same time, the conceptualization of certain areas of welfare as rights of the individual guarantees the formal access of all residents in Spain to a series of social protection programmes, such as healthcare and

education, regardless of their legal status. In this section we will analyze in detail the official mechanisms through which these social rights are realized and look at problems that appear in practice for achieving equality between the immigrant and the autochthonous populations.

### 3.3.1. Social security

The social security system is the foundation of the Spanish welfare state. Financed basically through the contributions of employees and employers, it is comprised of a series of insurance schemes to respond to specific social risks linked to the workplace (unemployment, workplace accidents, disability and retirement). The contributory nature of these insurance programmes implies that the basic criterion defining the right of access to most of the programmes managed by the National Social Security Institute (*Instituto Nacional de la Seguridad Social or INSS*) or other autonomous bodies linked to it (Public Employment Service (*Servicio Público de Empleo or SPE*), etc.) is affiliation to social security during a specified period of time: to receive a retirement pension or unemployment benefits a worker must have contributed during a stipulated period specific to each of the insurance schemes, and the pension or subsidy to be received will be proportional to the duration and quantity of the worker's contribution. The INSS insurance schemes operate under a pay-as-you-go and not a capitalization system. In other words, each worker contributes to a common fund, from which the necessary resources are extracted to meet the payments of benefits and subsidies that must be made at any one time.<sup>(5)</sup>

The principal exceptions to the necessity of making previous contribution to access the benefits of social security are the non-contributory pension and disability programmes. These schemes, providing relatively limited benefits and based on verifying that beneficiaries have no other sources of income, cover both Spanish nationals and foreigners legally residing in Spain who have not made social security contributions during the legally stipulated period and who meet all the conditions for applying for these benefits (age or degree of recognized disability).

(5) The capitalization mode refers to systems in which each worker possesses a personal account in which his/her contributions accumulate, and from which funds will be extracted to meet the benefits the worker has a right to in the future (as now occurs to some extent in the Swedish case since the end of the 1990s or in a number of Eastern European countries since reforms resulting from the collapse of the Socialist Bloc).



Nationality does not play an important role in the established criteria defining the right of access to INSS benefits, as both Spanish citizens and immigrants with work permits and employment in the formal economy have access to these systems under equal conditions. This is one of the reasons why immigrants' access to social security benefits rarely become an object of public or political debate, as they are only receiving a benefit that they previously contributed toward.

In recent years, the percentage of foreigners among INSS affiliates has remained fairly stable, between 10 and 11% in the case of men and around 10% among women.

TABLE 3.1

### Evolution of social security affiliates by nationality

In percentages

NATIONALITY	2001	2003	2005	2007	2009
Spain	96.1	94.4	90.3	89.7	89.5
Rest of the EU (without Romania)	1.0	1.2	1.7	2.3	2.2
Rest of Europe (without Romania)	0.2	0.4	0.6	0.3	0.4
Romania	0.1	0.3	0.9	1.2	1.6
Latin America (without Ecuador)	0.7	1.1	2.4	2.5	2.7
Ecuador	0.4	0.8	1.5	1.3	1.1
Africa (without Morocco)	0.3	0.4	0.6	0.5	0.5
Morocco	0.8	1.0	1.4	1.3	1.3
Asia and Oceania	0.3	0.4	0.6	0.7	0.8
<b>Total Foreigners</b>	<b>3.9</b>	<b>5.6</b>	<b>9.7</b>	<b>10.3</b>	<b>10.5</b>

Source: based on data from the INSS.

We can see in table 3.1 that the effects of crisis have been more visible among African and Moroccan workers, as their percentage among affiliates in the social insurance system has declined in the last three years. In addition, among Ecuadorean workers – with a high presence in sectors such as construction that have been greatly affected by the crisis – the number of affiliates has also significantly declined. In contrast, the sum of all Latin American affiliates (excluding Ecuadoreans) reveals only a slight variation. The other groups have also maintained relatively stable percentages of affiliation, beyond the variations produced by the statistical effects resulting from the incorporation of Poles, Romanians and Bulgarians into the EU.

TABLE 3.2

**Comparative evolution of foreign affiliates to social security by sex**

In percentages

NATIONALITY	2006		2007		2008	
	MEN	WOMEN	MEN	WOMEN	MEN	WOMEN
Spain	89.2	90.4	89.1	90.4	89.4	90.1
Rest of the EU (without Romania)	2.2	1.8	2.5	2.0	2.4	2.0
Rest of Europe (without Romania)	0.6	0.7	0.3	0.4	0.3	0.4
Romania	1.0	0.9	1.3	1.0	1.4	1.1
Latin America (without Ecuador)	2.1	3.0	2.1	3.1	2.2	3.3
Ecuador	1.3	1.8	1.1	1.6	1.0	1.5
Africa (without Morocco)	0.9	0.2	0.8	0.2	0.7	0.2
Morocco	2.0	0.6	1.9	0.6	1.8	0.7
Asia and Oceania	0.8	0.5	0.8	0.5	0.9	0.6
<b>Total Foreigners</b>	<b>10.8</b>	<b>9.6</b>	<b>10.9</b>	<b>9.6</b>	<b>10.6</b>	<b>9.9</b>

Source: based on data from the INSS.

In the case of women immigrants, the affiliation figures shown in table 3.2 reveal a slight trend contrary to what might initially be expected, as their proportion among affiliates is not in decline but on the increase. The logic behind this dynamic is clearly linked to the fact that women immigrants that work in the formal economy are employed in sectors less affected by the crisis. In this regard, African and Moroccan women are better off than men of the same origin.

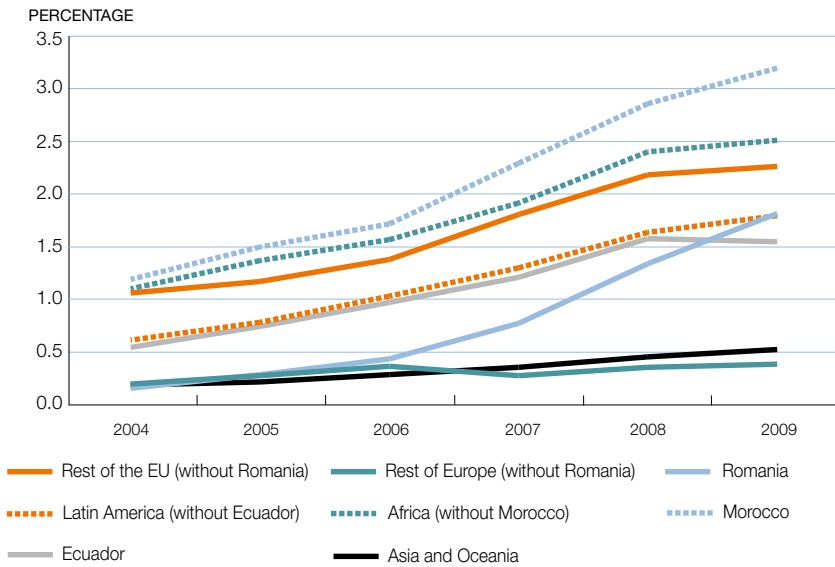
Maintaining employment is key for immigrants because in many cases renewal of work and residency permits depends on having a job. In this regard, entering into an irregular situation due to the legal framework regulating the obtention and renovation of work permits is one of the risks threatening immigrants' access to the social insurance system. Remaining employed in the formal economy and contributing to social security is a central condition for access to the benefits administered by the INSS. The persistence of undocumented immigration as well as the structural role of the underground economy in the Spanish production system create important obstacles to immigrants having access to the social insurance system and contributing to public finances.

The rise in the number of jobseekers and recipients of unemployment benefits among immigrants reflects the impact the economic crisis has had on immigrant participation in the labour market. Thus, 750,000 of the more than

4.5 million jobseekers registered with Spain's Public Employment Service at the beginning of 2010 were foreigners.

GRAPH 3.1

**Evolution of foreigners receiving unemployment benefits as percent of total beneficiaries**



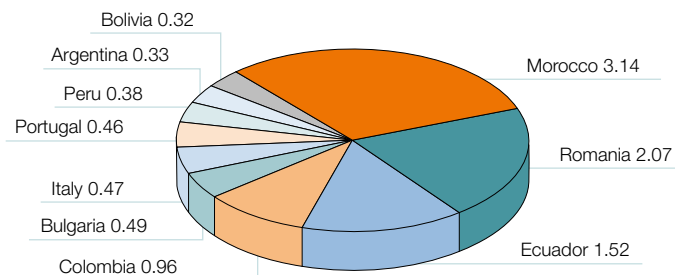
Source: based on data from the State Public Employment Service.

As graph 3.1 shows, the presence of immigrant groups among those collecting unemployment benefits has increased considerably in recent years. Latin Americans and Moroccans are among the most affected. In the last five years, the presence of these groups among the population receiving unemployment benefits has tripled.

GRAPH 3.2

## Percentage of total unemployed from the 10 major nationalities among foreigners in Spain

Data from December 2009



Source: based on data from the State Public Employment Service.

The most numerous immigrant groups in the population are also the most numerous groups in terms of unemployment: in first place are the Moroccans, followed by Romanians and Ecuadorians.

The amount and duration of unemployment benefits immigrants receive are directly tied to the duration and level of their previous contributions. This has a number of important social and political implications. First of all, recipients of this benefit are receiving it because they contributed to the social insurance system, and they do so in proportion to their previous contributions, leaving little room for this to become a politicized issue. Secondly, the duration of these benefits is limited. Once unemployment benefits are used up, the unemployed no longer receive the subsidy. Some programmes providing aid to those whose unemployment benefits have run out are also open to immigrants legally residing in Spain,<sup>(6)</sup> although due to their non-contributory character they provide only minimum temporary assistance for persons in situations of difficulty.

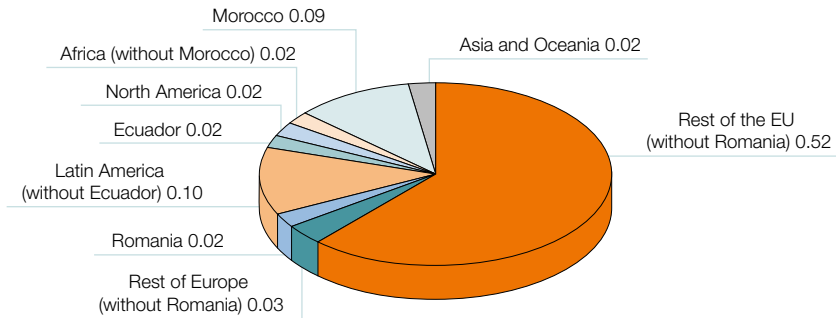
Currently, immigrant labour helps to balance the social security budget, given that this population is a net contributor to the system and claims few benefits. This is particularly true regarding retirement pensions, which as we saw in the previous chapter, constitute the largest expense in the social protection system.

(6) This is the case of the Temporary Program for Protection from Unemployment and for Integration (*Programa Temporal de Protección por Desempleo e Inserción*) in effect from August 2010 until February 2011 (providing 426 Euros a month during a period of six months, which can be extended an additional six months, for those individuals whose unemployment benefits have run out) or the programme that has replaced it, which links receiving the subsidy to participation in vocational training.

GRAPH 3.3

### Beneficiaries of pensions by nationality

March 2010



Source: based on data from the INSS.

Currently, less than 1% of the recipients of pensions in Spain are immigrants (graph 3.3). Of this 1%, more than half are EU citizens; France with 16,400 and Germany with 9,400 pensioners occupy the first positions on the list of foreign recipients of retirement pensions in Spain. The third country on the list of foreign retirees is Morocco (approximately 8,000 pensioners); the following country among those categorized as economic immigrants (Argentina, with around 2,200 pensioners) does not appear until the 9<sup>th</sup> position on the list. In this context it is quite clear that immigrants, the great majority of whom are in their most productive years, constitute a net contribution to the INSS budget, and they will continue to be for at least the next two decades (assuming that the number of immigrants remains constant without new arrivals). Evidently, this clear positive balance will not be as sharply defined in the future as the first cohorts of migrant workers settled in Spain in the mid 1980s begin to retire. In chapter 6, we will return to this question when analyzing the impact of immigration on the financial sustainability of the Spanish welfare state.

### 3.3.2. Healthcare

The Spanish public healthcare system is a clear example of the particularities of the Mediterranean welfare regime. Composed traditionally of a multiplicity of social insurance schemes, it underwent a slow process of consolidation beginning in the 1950s toward a relatively unified system within the social security system

and became the Spanish National Health System or NHS (*Sistema Nacional de Salud*) in the second half of the 1980s (Guinea and Moreno Fuentes, 2009). This development made it possible to extend healthcare coverage to virtually all the population with Spanish nationality by the beginning of the 1990s.<sup>(7)</sup> The relative lack of legislative clarity regarding the rights of foreigners, along with a restrictive interpretation of the General Law on Healthcare (*Ley General de Sanidad* (LGS)), meant that the universalization of healthcare coverage applied in 1989 referred only to the Spanish.<sup>(8)</sup> Open and free access to the public healthcare system for immigrants remained conditioned by their contributions to the social security system. Citizens of the EU could access the NHS through the mutual recognition of healthcare coverage within the European Union between countries, while healthcare for refugees and asylum seekers was provided by the Red Cross in concert with the state. Undocumented immigrants were in the most precarious position, with access only to emergency services and the treatment of infectious diseases. Diverse parallel networks made up of NGOs, charitable healthcare services (dependent on autonomous community and municipal governments) and NHS healthcare professionals (on their own and voluntarily) provided care to these individuals. This partial and segmented coverage suffered from a severe lack of resources, provoking overlap in the provision of healthcare services and leaving important gaps in care for these groups, who were ultimately dependent on the goodwill of healthcare professionals.

The first undocumented immigrants that formally received access to NHS services under conditions equal to those for Spanish citizens were pregnant women and children, after the approval of the 1996 Child Welfare Law (*Ley de Protección del Menor*) and the 1996 reform of regulations for the implementation of the 1985 National Immigration Law (*Ley de Extranjería* 7/1985). The practical application of this legislation was frozen, however, because of the complexity of the relationship between the different government agencies responsible for implementing it, particularly the multiple levels of government involved (state, autonomous and even municipal).

(7) In 1982, 85.5% of the Spanish population was covered by the public system of healthcare insurance. After the application of the LGS, coverage reached 97.1% in 1987. In 2006, 98.3% of the Spanish population was covered by the public healthcare system. Of the 1.7% left without coverage, those of Spanish nationality were essentially individuals who, having their own economic resources, were not eligible for non-contributory schemes providing coverage.

(8) The legislation that defined the way in which individuals without economic resources could access the services of the NHS required Spanish nationality to be eligible.

Healthcare coverage for undocumented immigrants became part of the political agenda at the beginning of 1999 as a consequence of the limited implementation of the legislation. Despite the relative weakness of the social groups advocating for the incorporation of immigrants into the healthcare system (third sector public health organizations and immigrant rights organizations), this movement found a window of political opportunity in the debate over the Organic Law 4/2000, 11 January, on the rights and liberties of aliens in Spain and their integration into society (*Ley Orgánica sobre Derechos y Libertades de los Extranjeros en España y su integración social*), generally referred to as Law 4/2000. This new law expanded healthcare coverage to all persons that could demonstrate that they were residing in Spain and lacked resources to cover the cost of their healthcare. The mechanism chosen to link healthcare coverage with the criterion of residency was enrolment in the municipal population register.<sup>(9)</sup> This formula resolved the issue over the use of the healthcare system by short-term visitors to the country (tourists, etc.).

Despite its simplicity, the procedure for enrolling in the municipal register is an area in which bureaucratic discretion or the politicization of immigration can interfere with the effective access of immigrants to healthcare services. Obtaining the necessary healthcare ‘card’ depends on the requirements proposed by government officials of different government levels in the process (INSS, regional health services, state tax authority and municipal governments). As a result, in recent years cases have come to light of municipalities that have blocked undocumented immigrants from enrolling in the municipal population register, contravening Spain’s Basic Law on Local Government (*Ley de Bases de Régimen Local*), which establishes the requirements for enrolment.

Analysis of the data from the FOESSA 2007 survey provides us with an accurate picture of disadvantaged sectors access to the NHS. While 3% of the population above the poverty line (above the threshold of 60% of the median national income) stated that they did not have access to the National Health System, this percentage increases to 5.2% among those below the poverty line.

A more complex categorization of social exclusion provides a more detailed view of the limitations of access to the NHS. Based on 39 indicators of economic and

(9) Initially the mere presence of an individual in Spanish territory was sufficient to access the national healthcare system’s services, however, the specific “problem” of the autonomous cities of Ceuta and Melilla required the introduction of a filtering system that would impede the complete saturation of the healthcare services in those cities.

social exclusion from this survey households can be classified into four broad categories according to the number of social exclusion factors they are affected by: ‘Integrated’ (households not affected by any of the measures of exclusion used); ‘Precariously integrated’ (households affected by one of the nine dimensions of exclusion measured); ‘Vulnerable’ (households affected by two or three of the dimensions of exclusion), and ‘Excluded’ (households affected by four or more of the dimensions of exclusion) (Guinea and Moreno Fuentes, 2009). Based on this classification we can see that 8% of the individuals interviewed from ‘excluded’ households stated they had no type of healthcare coverage.<sup>(10)</sup>

TABLE 3.3

### Healthcare coverage in function of degree of social exclusion of household

TYPE OF HOUSEHOLD	TYPE OF HEALTHCARE COVERAGE			
	PUBLIC CONTRIBUTORY	NON CONTRIBUTORY	PRIVATE	NONE
Integrated	3,727	71	387	0
	97%	2%	10%	0%
Precarious	2,013	33	157	0
	95%	2%	7%	0%
Vulnerable	1,405	55	201	0
	96%	4%	14%	0%
Excluded	282	21	4	28
	85%	7%	1%	8%

Note: the percentages do not add up to 100 because they refer to multiple responses.  
Source: based on data from the 2007 FOESSA survey.

As the category of ‘excluded’ makes up only 4.3% of the total number of individuals in the sample and the percentage of individuals in this category that state they have no healthcare coverage is below 10%, there are actually only 28 cases of individuals in this situation in the survey sample; as a result, it is not possible to draw statistically significant conclusions. However, the fact that all of these individuals are immigrants is certainly suggestive regarding the difficulties of access that undocumented immigrants may have to the National Health System.

(10) This result is to a certain extent based on a tautology, as the absence of healthcare coverage for any household members is one of the variables used to construct the exclusion index; but the concentration of persons in this situation in the category defined as “excluded” suggests that this figure reflects a specific social reality that is important to highlight.



TABLE 3.4

**Type of healthcare coverage by household category and nationality**

	INTEGRATED		PRECARIOUSLY INTEGRATED		VULNERABLE		EXCLUDED	
	SPANISH	OTHER	SPANISH	OTHER	SPANISH	OTHER	SPANISH	OTHER
Other	3,718	105	1,845	265	1,309	111	258	34
Only non-contributory	68	3	26	6	9	46	5	13
Without coverage	0	0	0	0	0	1	0	28
Risk of having only non-contributory	0.02	0.03	0.01	0.02	0.01	0.29	0.02	0.17

Source: based on data from the 2007 FOESSA survey.

A significant number of foreign residents in Spain say they have access to NHS benefits through non-contributory healthcare assistance. Although only 176 individuals from the sample rely on this as their only form of healthcare coverage, a comparison of the relative risk<sup>(11)</sup> of immigrants and the autochthonous population depending on this mechanism for access to healthcare (based on the absence of economic resources) reveals a substantial difference between them.

TABLE 3.5

**Relative risk of having only non-contributory healthcare coverage by type of household and nationality**

	INTEGRATED	PRECARIOUSLY INTEGRATED	VULNERABLE	EXCLUDED
Foreigners vs. Spanish	1.5	1.6	42.4	9.1

Source: based on data from the FOESSA 2007 survey.

For immigrants that live in ‘integrated’ households the relative risk of counting on non-contributory assistance as the only form of healthcare coverage is 1.5 times greater than for the native-born population in the same household category. This ratio increases to 9.1 in the case of immigrants living in “excluded” households, and among those that live in “vulnerable” households immigrants are 42.4 times more likely to count on this assistance than the native-born.<sup>(12)</sup>

(11) The concept of relative risk, or the ratio between two risks, indicates the probability of an event occurring (in this case, depending solely on non-contributory healthcare assistance) among a specific group (in this case individuals classified by the type of household in which they live and by their nationality).

(12) It should be remembered that, given the reduced size of the sample, this survey only permits us to identify tendencies rather than to estimate with absolute precision differences that exist in the population.

### 3.3.3. Social services and the safety net

The social services sphere constitutes the weakest link in Spain's social protection system. Vaguely defined and characterized both by its complicated institutional organization and its inadequate funding, this area of social policy is poorly developed, as generally occurs in countries within the Mediterranean welfare model. Social services were established in Spain under Franco from previously existing charitable schemes, and following the same logic, they are intended to provide a minimum level of care or service to populations that are excluded from or insufficiently protected by the social security system.

After the transition to democracy, the social service legislation passed by the autonomous communities reflected a willingness to introduce a more universalist orientation to these types of programmes with the aim of providing care to all citizens regardless of their employment situation or income level. The creation of the Ministry of Social Affairs at the end of the 1980s was also an attempt to improve cooperation between levels of government through general coordination plans (regarding the elderly, drugs, equal opportunity and youth). Among these plans the Concerted Plan for the Development of the Basic Provision of Social Services by Local Government (*Plan Concertado para el desarrollo de prestaciones básicas de servicios sociales de las corporaciones locales*) stands out, the aim of which is to increase cooperation between different levels of government in the design, development and financing of social services (Arriba and Pérez, 2008). Despite this, the desire to overcome the discretionary character of charity has never been concretized at a practical level through a system of benefits of a universal nature, financed with taxes and guaranteeing the individual rights of the citizenry (Aguilar, 2009). Social services have remained limited to providing care for the most disadvantaged sectors of society, with the rest of the population relying on markets (formal or informal) for the provision of the services they need. In this relatively new system of social services, the moralist discretion of traditional charity has been replaced by the discretion of a professionalized bureaucracy.

Included under the umbrella of social services are the main assistance mechanisms to facilitate the social integration and autonomy of the most vulnerable, those who do not have access to the contributory social protection systems and who lack economic resources. Operationally, the social services provided by the autonomous communities are divided into primary social care services and specialized services. Primary social care systems provide services of a general

character, which are normally managed by municipalities and aimed toward a broad spectrum of activities — from case evaluations to service provision, such as home care. Specialized services, generally run by the autonomous communities, are aimed at specific populations or respond to concrete problems.

Also found among the responsibilities of social services is the management of the safety net: non-contributory pensions (NCP) and minimum insertion income (MII), both of which are means-tested programmes requiring income verification. The 1990 Law of Non-Contributory Pensions of the Social Security (*La Ley de Prestaciones no Contributivas de la Seguridad Social* or *Ley 26/1990*) established a pension system for persons over 65 years of age or with disabilities (with more than 65% disability) in situations of economic vulnerability. In addition, the autonomous community governments gradually put into effect minimum income schemes aimed at facilitating the social insertion of families at risk of social exclusion not covered by other social protection schemes (Arriba and Pérez, 2008).

Finally, the last element of social policy that we will discuss in this section is the System for Autonomy and Care for Dependency (*Sistema de Autonomía y Atención a la Dependencia* or SAAD), launched after the passage of the Law on Promotion of Personal Autonomy and Care for Dependent Persons (*Ley de Promoción de la Autonomía Personal y Atención a Personas en Situación de Dependencia* or *Ley 39/2006*), often referred to as the Long-Term Care Act. This legislative development has come to be called the “fourth pillar of Spain’s welfare state” and is the most significant advance in the expansion of social protection in Spain in recent decades (Marbán, 2006). The passage of this law recognizes the *subjective* right to assistance and care for those facing functional dependence (defined as a lack of physical, psychological or intellectual autonomy implying the need for help in carrying out the basic activities of daily life). Since the passage of the law, this system has gradually been established based on a philosophy of the sharing of competencies and responsibilities among the different levels of government. In addition, the law assigns an important role to families both in the provision of care as well as in its financing when care is provided outside of the family.

In seeking access to social services and benefits, both the autochthonous and immigrant populations encounter the same lack of organizational clarity (Guillén *et al.*, 2002). However, the immigrant population faces certain additional obstacles.

Article 14 of Law 4/2000 entitles foreigners legally residing in Spain to basic and specialized social services and benefits under the same conditions as Spanish citizens. Foreigners with an irregular administrative status, on the other hand, have a right to basic social services and benefits through enrolment in municipal population registers. This distinction is not based on a clear legal definition regarding the content of basic and specialized services. As a result, while immigrants residing legally in Spain have access to the same services and benefits as Spanish nationals (in principle), each autonomous community has resolved in its own way the issue of undocumented immigrants' access to its social services network: in some regions requirements are flexible in order to facilitate access, while in others parallel mechanisms have been established to attend undocumented immigrants, generally in collaboration with third sector organizations (Rodríguez Cabrero, 2003).

The issue of immigrants' access to social services has led to the fear of these services being flooded due to the vulnerability of immigrants, the result of their precarious employment, lower salaries, lack of family and social networks and the flawed coverage of other social protection systems. In addition, the generation of potential 'social service tourists' or the creation of work disincentives have led to concerns regarding possible 'dependency'. The essential argument is that immigrants could become accustomed to depending on social subsidies, and this could discourage them from seeking work.

The autonomous communities provide most of the data regarding the use of social services,<sup>(13)</sup> which is then introduced by Spain's Ministry of Health and Social Policy into its Social Service User Information System (*Sistema de Información de Usuarios de Servicios Sociales* (SIUSS)) database. The most recent information available, from the year 2008, gathers together data from 13 autonomous communities and the autonomous cities of Ceuta and Melilla (MSPS, 2009).<sup>(14)</sup> In table 3.6 we can see that in that year foreigners represented approximately 13.7% of the users recorded in the SIUSS, a percentage very similar to the 11.55% of the population in those regions that are foreigners.

However, if we focus instead on the total number of interventions, this group is clearly underrepresented. Of the total of 2,385,683 social service interventions

(13) The fact that the gathering of this data is not obligatory means that the number of incomplete cases is quite large, limiting the significance of the data analyzed (Informe del SIUSS, 2008). The classification of users in the category "immigrant" should be noted with caution, as significant bias may have been produced.

(14) Does not include the Canary Islands, Castilla-La Mancha, Catalonia and the Basque Country.

in these autonomous communities and cities, 163,308 were considered as assistance to immigrants (representing only 6.85% of all the interventions).

Although the available information on minimum insertion income is not complete, the data do not confirm fears of a massive number of foreigners among the beneficiaries of these types of programmes. According to the data gathered and published by the Ministry of Health and Social Policy, in 2008 immigrants made up 11.2% of the beneficiaries of MII programmes in Spain, a percentage slightly below the actual weight of the immigrant population in Spain's overall population, which was approximately 12.2% (MSPS, 2010)<sup>(15)</sup> In addition, if we take into consideration that immigrants are more likely to be among the most disadvantaged groups in the Spanish population, and therefore represent a greater proportion of the population at risk of social exclusion, it is clear that the range of coverage of MII programmes for the immigrant population is considerably below what would correspond to this group proportionately and that a significant number of immigrants are left without the protection provided by these programmes.

TABLE 3.6

### Number and percentage of users of social services by nationality 2008\*

NATIONALITY	NO. OF USERS	PERCENTAGE OF THE TOTAL
<b>Total</b>	<b>1,279,189</b>	<b>100.00</b>
Spain	1,104,104	86.31
Maghreb	42,098	3.29
EU	35,302	2.76
Rest of Europe	5,327	0.42
Asia	1,799	0.14
Central and South America	70,585	5.52
Sub-Saharan Africa	6,962	0.54
Rest of Countries	8,009	0.63
Stateless	5,003	0.39
<b>Total of foreigners**</b>	<b>175,085</b>	<b>13.69</b>

\* These data reflect information from 13 autonomous communities which contributed data to the SIUSS.

\*\* The number and percentage 'total of foreigners' includes all users of a nationality other than Spanish.  
Source: SIUSS 2008 Report (Ministry of Health and Social Policy, 2009).

(15) No information is available for Andalusia, Extremadura, the Basque Country and La Rioja.

In table 3.7 we can see the great variation among autonomous communities in this regard, which is in part explained by different eligibility requirements. While in the majority of communities legal residency is required to be eligible for MII schemes, the Balearic Islands, Navarra and the Basque Country have extended coverage to all individuals enrolled in municipal population registers (regardless of their administrative status), while in Andalusia access to these benefits is denied to non-EU immigrants (Laparra, 2008). As a consequence, while in some regions less than 10% of the beneficiaries of MII schemes were immigrants in 2008 (specifically in Ceuta, Murcia, Asturias and Galicia), this percentage increased to 30% in the Basque Country, 33.6% in Catalonia, 55.5% in the Balearic Islands and 61.4% in Navarra.

TABLE 3.7

### Immigrants receiving minimum insertion income (MII) 2009

AUTONOMOUS COMMUNITY	IMMIGRANTS RECEIVING MII	TOTAL RECIPIENTS OF MII	PERCENTAGE OF IMMIGRANTS RECEIVING MII	RECIPIENTS OF MII FOR EVERY 10,000 INHABITANTS	RECIPIENTS OF MII FOR EVERY 10,000 IMMIGRANTS
Andalusia	–	27,212	–	32.77	–
Aragon	477	1,768	27.00	13.14	27.71
Asturias	603	7,902	7.60	72.81	127.97
Balearic Islands	1,075	1,937	55.50	17.68	45.25
Basque Country	–	55,410	30.00	255.08	–
Canary Islands	414	3,775	11.00	17.94	13.74
Cantabria	291	2,223	13.00	37.72	76.38
Castilla-La Mancha	97	603	16.00	2.89	4.29
Castilla y Leon	330	2,748	12.00	10.71	19.68
Catalonia	7,413	22,061	33.60	29.51	62.33
Extremadura	–	1,475	–	13.37	–
Galicia	580	6,360	9.10	22.74	54.39
La Rioja	–	756	–	23.50	–
Madrid	1,700	11,426	14.90	17.88	15.98
Murcia	55	775	7.10	5.35	2.33
Navarra	3,736	6,087	61.40	96.53	528.97
Valencia	696	4,001	17.40	7.85	7.82
Ceuta	2	88	2.20	11.18	5.63
Melilla	123	251	49.00	34.16	161.90
<b>Total</b>	<b>17,592</b>	<b>156,858</b>	<b>11.20</b>	<b>3.55</b>	<b>31.14</b>

Source: based on data from the Report on Minimum Income Insertion of the Ministry of Health and Social Policy 2009 (MSPS, 2010); Moreno and Aierdi Urraza, 2008 and INE.

The basic characteristics of MII benefits (their limited quantity and strict conditions for eligibility), as well as immigrants' long-term objectives (integration in the labour market, accumulating savings, etc.), mean that they only serve to provide temporary aid in periods of particular economic difficulty. Available data reveal that in fact, the way foreigners use these programmes proves them to be successful: brief participation and relatively rapid exit to enter the labour market. These benefits, therefore, are a form of one-off aid to prevent a deterioration of their beneficiaries' economic situation and in some cases make possible other types of social service interventions (Serrano and Arriba, 2002).

It is very likely that the presence of immigrants among the beneficiaries of these types of income transfer programmes (both non-contributory pensions and minimum insertion income) will be greater in the future due to the declining economic situation, high unemployment and unemployment benefits ending. Other processes of sociodemographic change supporting this hypothesis are the acceleration of the family reunification process and the gradual arrival at retirement age of sectors of the immigrant population that have only had limited participation in the labour market and have not been able to secure the provision of a pension of a contributory character.

### 3.3.4. Education

The growing presence of immigrant students also implies significant challenges for public policy in education. One series of challenges concerns immigrant students' formal access to education under equal conditions with the native population. Legislation on immigration has established the right of school-age immigrant children to an education (article 9 of Law 4/2000), but recognition of this right has not been enough to ensure their effective access to education on equal terms.<sup>(16)</sup> As we will see in the following pages, the data show that immigrant children must overcome considerable obstacles to enter the Spanish educational system, and they generally do so under inferior conditions in comparison with native students, which contributes to poorer educational outcomes.

Of particular importance in terms of access to education is the degree of comprehensiveness and stratification of the educational system. Spain can

(16) The right of immigrants to education was at first limited to legal residents, but this was subsequently changed to include all school-age children (Aja, 2000).

currently be characterized as having a relatively comprehensive educational system, one which pursues educational equality through implementing a single system for all students.<sup>(17)</sup> However, this educational system is characterized by a fundamental tension between two traditional visions of education: a liberal-conservative one, which prioritizes the *freedom* of parents to choose the type of school they want their children to attend, therefore accepting a greater degree of differentiation in patterns of schooling; and a social democratic one, which sees education as a social right and places greater emphasis on *equality* and comprehensiveness (Carbonell and Quintana, 2003).

The 1978 Constitution included both the principle of freedom as well as that of educational equality in order to facilitate a consensus between different political forces. As a consequence of this deliberate ambiguity, Spain's educational laws have regularly undergone drastic changes in orientation, shifting between these two ideological positions (Bonaf, 1998). The first education law under democracy, the 1980 Organic Act on the Right to Education (*Ley orgánica 8/1985, de 3 de julio, de derecho a la educación* (LODE)), was designed to break with the strict traditional division between academic and vocational education inherited from the dictatorship. The legacy of the Franco regime was a profoundly unequal educational system, polarized between private schools that taught the well-off classes, and public schools for those who could not afford the former (Calero and Bonaf, 1999). In 1990, the government led by Spain's Socialist Party (PSOE) passed the Organic Act on the General Organization of the Educational System (*Ley orgánica 1/1990, de 3 de octubre, de ordenación general del sistema educativo* (LOGSE)) with the objective of promoting equal educational opportunity. The Popular Party (PP) in turn, passed a new education law in 2002, the Organic Act on the Quality of Education (*Ley orgánica 10/2002, de 23 de diciembre, de calidad de la educación* (LOCE)), which for the first time recognized the rights of parents to freely choose the school their children would attend, while at the same time questioning certain of the elements in favour of equal opportunity explicitly guaranteed by the LOGSE. The LOCE sought to introduce a differentiated model of secondary education in which

(17) Comprehensive systems are those in which all students follow the same curriculum and have a single type school for compulsory secondary education, while selective or differentiated systems group students based on performance or ability (Green, Leny and Wolf, 1999).

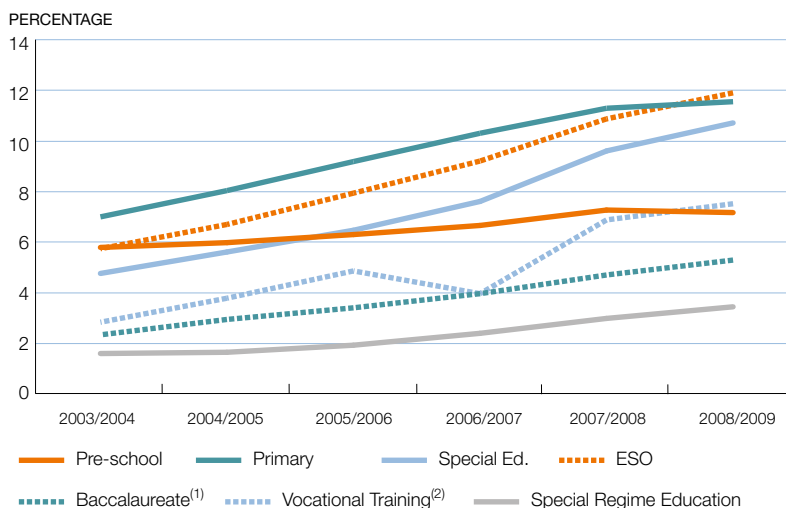


students would follow different curriculums based on their marks. This educational reform, designed to reduce the comprehensiveness of the system was cut short with the return of the PSOE to power, and with the passage of the Organic Act on Education in 2006 (*Ley organica 2/2006, de 3 de mayo, de educación* (LOE)), which was intended to strengthen the comprehensiveness of the system and its inclusive character, through its objective of ‘quality with equality for all’.

In this context, the arrival of students of immigrant origin has exacerbated the tension between educational equality and educational freedom. The increase in students of immigrant origin started to be visible in Spanish classrooms at the end of the 1990s, but became especially evident beginning in academic year 2001-2002 (and in particular in certain regions, such as Catalonia, Madrid, Valencia and Andalusia). Despite the significant increase in immigrant students, in the academic year 2009-2010, they still accounted for only 9.6% of the total student population in compulsory education, 762,746 students of a total of 7,606,000 (MEC, 2010). This percentage is below the European average and far from that found in countries with a tradition of receiving immigrants, such as Germany, France and Sweden, where students of immigrant origin, if we include both first and second generation immigrants, make up a much greater proportion of the total in compulsory education. However, in these countries the majority of students of immigrant origin are second generation (having been born and educated in the host country), while in Spain, the majority of immigrant students are first-generation (or are part of the so-called generation 1.5 who came to Spain at a young age).

GRAPH 3.4

### Evolution of the percentage of non-university foreign students by education level: 2003-2009



(1) Includes foreign students in the LOGSE baccalaureate (ordinary regime, adult education and distance learning), BUP/COU (in-classroom and distance learning) and the experimental baccalaureate.  
 (2) Includes foreign students that are in vocational training cycles (in-classroom and distance learning) and social guarantee programmes.  
 Source: based on data from the Ministry of Education and Science.

High enrolment rates in Spain indicate that despite the existence of certain obstacles immigrant students are finally being included in the educational system. The enrolment figures published by the Ministry of Education and Science for academic year 2008-2009 show the/a growing presence of immigrant students in all stages of compulsory education; particularly in primary education, where foreigners are more than 11.5% of the total students and in social guarantee programmes, where they represent 12.8% of students. In Compulsory Secondary Education (ESO) immigrants account for approximately 12% of the student body, although in recent years it is in this stage of education where the relative growth in students of immigrant origin has been the greatest, a consequence of the increase in migratory flows, but also of the implementation of the LOGSE, with its establishment of ESO and the extension of compulsory education from 14 to 16 years of age.

Table 3.8 provides a comparison of the distribution of native-born students and students of immigrant origin by different educational stages for academic year 2008-2009. The majority of students of immigrant origin are in the initial stages of education, 41% are in primary school and 16.7% in pre-school. Slightly under one third of immigrant students in 2008-2009 were in ESO (29%), while only 4% were enrolled in the baccalaureate programme and 5% in vocational training. In contrast, the educational profile of native-born students is considerably different, with the proportion of students in post-compulsory stages of secondary education being higher, particularly in the baccalaureate, where the percentage is twice that of students of immigrant origin.

TABLE 3.8

**Number and percentage of foreign students by education level: academic year 2008-2009**

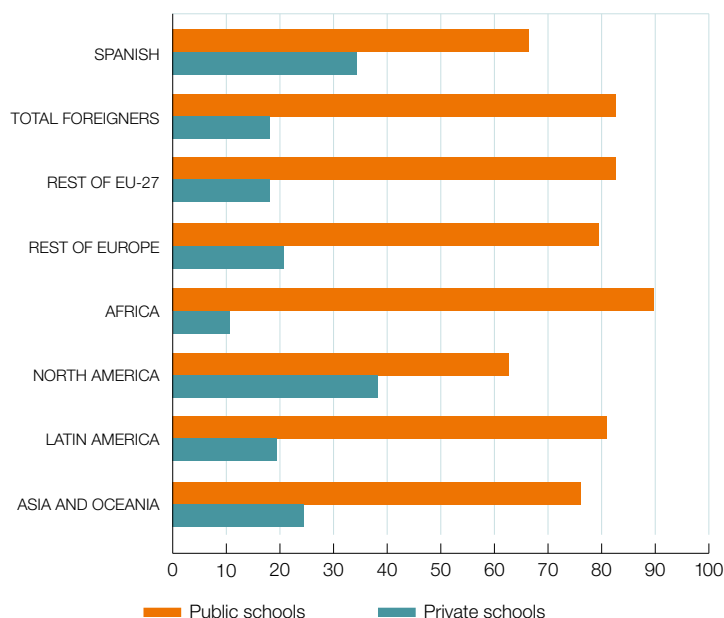
	PRE-SCHOOL	PRIMARY EDUCATION	SPECIAL ED.	ESO	BACCALAUREATE	VOCATIONAL TRAINING	TOTAL
<b>Total</b>	<b>1,784,629</b>	<b>2,659,424</b>	<b>30,767</b>	<b>1,810,298</b>	<b>628,741</b>	<b>542,947</b>	<b>7,456,806</b>
Foreigners	124,211	305,520	3,454	213,530	32,085	40,197	743,696
%	16.70	41.08	0.46	28.71	4.31	5.40	100
Spanish	1,660,418	2,353,904	27,313	1,596,768	596,656	502,750	6,713,110
%	24.73	35.06	0.40	23.78	8.88	7.48	100

Source: based on data from the Ministry of Education, 2010.

Although immigrant students do not face significant difficulties in entering the educational system, obstacles do appear in accessing certain areas of the system. Thus, 82% of foreign born students are enrolled in public schools, 14.1% in the so-called *escuelas concertadas* (publically-funded private schools) and 3.8% in fully private schools (MEC, 2010). This concentration in public schools is more pronounced in certain autonomous communities or cities such as Melilla (95%), Ceuta (91%), Extremadura (91.3%) and Castilla-La Mancha (90.7%) (MEC, 2010). The communities with a more egalitarian distribution of immigrant students between public and private schools are Cantabria (70.7%) and the Basque Country (67.8%) (MEC, 2010).

GRAPH 3.5

### Percentage of non-university students by nationality and type of school: academic year 2009-2010



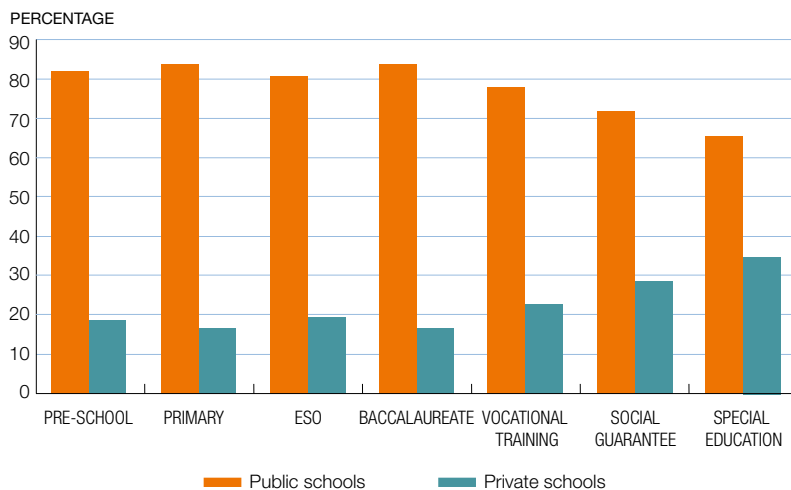
Source: based on data from the Ministry of Education and Science.

Despite the access of school-age immigrant children to compulsory education, only 10% of these children continue their studies upon reaching 16 years of age (López Peláez, 2006). This contrasts sharply with the general enrolment rate for persons of 17 years of age in Spain, which is 83% (OECD, 2010), 45% of whom follow an academic curriculum (the baccalaureate) and 38% vocational training (MEC, 2010). Students of immigrant origin make up 4.03% (25,382) of the baccalaureate students and 5.15% (23,389) of students in vocational training. Particularly noticeable is the presence of immigrants in social guarantee programmes (designed for those students that have not achieved the objectives set for the ESO), a presence which has grown at a rate of nearly 25% annually in recent years (CIDE, 2006:4).

GRAPH 3.6

## Percentage distribution of foreign students by education level and type of school

Academic year 2006-2007



Source: CIDE, statistical bulletin no. 16 (2006: 17).

Regarding higher education, there are few foreign students from non-European countries in Spanish universities. In public universities they make up 3.4% of the students, 2.3% in private centres affiliated with public universities, and 2.5% in fully private universities (table 3.9). This data should be interpreted with caution, as it includes students who have come to Spain specifically for their university studies but does not include students of immigrant origin who now possess Spanish citizenship.

How do we explain the concentration of students of immigrant origin in certain sectors? As we have mentioned, immigrant children have more than double the probability of native-born children of attending a school with a high concentration of foreign students (OECD, 2010: 36) and a greater probability of going to schools with a greater proportion of students of lower socioeconomic status. This phenomenon, found in all OECD countries, is part of the process of the reproduction of social class. There is a broad academic consensus on the impact of parental socioeconomic and educational levels on the educational level attained by students (OECD, 2007, 2010), so that these patterns in the

distribution of immigrant students imply a considerable level of school segregation, which will have a negative impact on their educational outcomes.

TABLE 3.9

### Foreign students enrolled by type of university, school and origin

Academic year 2009-2010

	TOTAL		PUBLIC UNIVERSITIES				PRIVATE UNIVERSITIES	
			FULLY PUBLIC		AFFILIATED SCHOOLS			
Total students	1,404,115	100.0%	1,182,482	100.0%	62,412	100.0%	159,221	100.0%
Total foreign students	45,223	3.2%	39,869	3.4%	1,450	2.3%	3,904	2.5%
EU-27	16,002	35.4%	13,685	34.3%	529	36.5%	1,788	45.8%
Others	29,221	64.6%	26,184	65.7%	921	63.5%	2,116	54.2%

Source: based on data from the Ministry of Education and Science.

The concentration of immigrant students in schools in certain neighbourhoods also reflects patterns of residential segregation, as immigrant families tend to settle in areas where housing is more affordable and where they find communities of the same national origin. In addition, the strategies followed by native born parents in choosing schools can also accelerate the process of concentration if these parents avoid sending their children to schools with a high proportion of immigrant students. These strategies, aimed at maximizing the quality of education received by their children, are generally based on the premise that the education level in a school is negatively affected by the enrolment of immigrant students. The lower social status given to certain types of education, such as vocational training, also explains the concentration of immigrants in these programmes. This is traditionally the case in Spain, which explains the relatively low enrolment rates among native-born students in vocational training, considerably below the European and OECD averages.

Along with individual indicators of parents' socioeconomic and educational levels, there are some institutional variables which can have a significant effect on school segregation. Social research on this issue has focused primarily on analyzing the impact of the degree of comprehensiveness of the education system on segregation, and this in turn on educational outcomes. Studies based on data from the Programme for International Student Assessment (PISA) have shown that less comprehensive systems (in other words,

differential systems) reproduce and reinforce economic, social and cultural inequalities to a greater extent (OECD, 2006b). The essential idea is that the social (socioeconomic and ethnic) composition of schools determines academic performance; therefore those systems that promote a higher degree of social heterogeneity within schools reduce inequality in outcomes among students (Duru-Bellat *et al.*, 2004).

International comparative studies rank Spain among the most egalitarian countries of the OECD (MEC, 2010; OECD, 2010), as indicated by the high percentage of children of manual workers in tertiary education. Although the *PISA index of economic, social and cultural status* reveals Spain's average score to be very close to the OECD average, Spanish students of lower socioeconomic and cultural status obtain better academic results than the average for the OECD, and the difference in academic results between students of higher and lower socioeconomic status is smaller. In addition, the schools that educate students of low socioeconomic and cultural status achieve better aggregate results than equivalent schools in other countries.

Nevertheless, although Spain has a considerably comprehensive education system, and students are not tracked at an early age, the system does have other stratifying elements which negatively impact on educational outcomes. There is, in particular, a sharp segregation of the student population between public and private schools linked to the difficulty in regulating parents' choice of schools for their children and the practices of private schools. The concentration and segregation of students of immigrant origin was exposed in a controversial study by the Ombudsman (*Defensor del Pueblo*) (2003), which led private schools to demand his resignation 'for not guaranteeing the right of all people to freedom of choice regarding school'.<sup>(18)</sup> Different studies have shown that private schools apply selection practices that are at the limits of legality, for example, charging additional fees that are an obstacle to low-income families (Bonal, 2002; Alegre, 2008) or dissuading certain types of families from applying for a place in the school, redirecting them to other, most often public, schools (Calero and Bonal, 1999: 124). This situation has led the Council of Europe to ask Spanish authorities to give greater attention to the appearance of 'school ghettos', which are a

(18) 'La escuela concertada pide la dimisión del defensor del pueblo' [Private schools call for the resignation of the ombudsman], Magisnet, 4-6-2003.

consequence of the practice of the systematic enrolment of immigrant students in certain public schools and the active ‘avoidance’ of their enrolment in private schools (ECRI, 2011).

Not only do schools apply strategies for the selection of students, but often these strategies are based on or reinforced by specific policies (or by the absence of effective regulation) regarding the conditions for access to schools financed with public funds. The legislation established by the PP government to modify the LODE included measures such as permitting schools to have their own admissions criteria, reducing the weight of family income and expanding catchment areas (the area in which a family can choose a school) (Bonal, 2002). These types of policies have been criticized in some communities (Carbonell and Quintana, 2003) as they alter the conditions for choosing a school and increase the degree of freedom private schools have in the admission of students. In addition, international studies have shown that the degree of public regulation of schools or the freedom they have to choose students plays a fundamental role in the appearance of socioeconomic and ethnic segregation in the schools (Burgess *et al.*, 2007). The potential effects of these policies on equality are considerable, as schools in systems lacking regulation compete among themselves for the best students, and students not selected end up in the least desired schools.

### 3.4. Conclusions

In this chapter we have found that the institutional frameworks characteristic of the economic system and the Spanish welfare state regime condition the access of immigrants to Spain’s social protection systems. In the case of social security, we have seen that the major obstacles to immigrant access to social insurance programmes result from the loss of employment (which in the long run implies the end of benefits), the persistence of the underground economy, the irregular administrative situation many face often resulting from the difficulty renewing work and residency permits and finally, the undocumented status under which many immigrants live.

Because of its relationship to the existence of institutional inertias, we have analyzed how the accumulation of insurance schemes as a way of universalizing



access to social protection programs (the case of the NHS) often leads to a situation in which those at greater risk slip through the interstices (Moreno Fuentes, 2004) — in this case, undocumented immigrants.

We have also seen that the decentralization of the Spanish welfare state has led to a dynamic of the diversification of access to those programmes that fall under the responsibility of autonomous community and local governments (for example, MII or education). This brings public decision making regarding the functioning of the welfare state closer to citizens, making it possible for the public to decide in their autonomous community or municipality the range of social protection services they want to extend to non-citizens. However, this also opens up space for the politicization of immigration, with results in some cases that are beginning to be problematic (the emergence of local political platforms which create or mobilize anti-immigrant sentiment for political gain).

Furthermore, we have seen in the educational sphere that the access of children of immigrants to school is mediated by a selection dynamic which tends to disproportionately concentrate immigrant children in public schools. In this case, existing institutional inertias are combined with a three-pronged strategy that is mutually reinforcing: on the one hand, the strategy of Spanish parents to avoid schools with a high percentage of immigrant children; on the other hand, the selective admissions policies of private schools, and finally, the reinforcement of both of these strategies through policies that fail to adequately regulate the degree of freedom parents and schools have, placing the principle of freedom before that of equal opportunity.

The functioning of the Spanish welfare regime under these premises has resulted in the emergence of inequalities which particularly affect immigrant populations. These inequalities will be addressed in the next chapter.

## IV. Immigration, inequality and equity

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Social protection systems can be analyzed from a dual perspective: by studying access to benefits and services (the dimension of equality), or by paying attention to the inequalities affecting specific groups, analysing the capacity of those social protection systems to meet the needs of those groups (the dimension of equity).

In the previous chapter we analyzed how the main characteristics of welfare regimes and their eligibility criteria determine the patterns of access to social protection systems for immigrant populations. In the present chapter we will see how formal eligibility does not in and of itself guarantee real access of immigrants to social protection programmes; nor does it assure that the results of these programmes will be fair. Bearing this in mind, we will look at the way Spain's public administrations have attempted to respond to these inequalities through equity policies, within the limits permitted by their mechanisms to manage diversity.

### 4.1. Factors explaining inequalities

Before analyzing the inequalities faced by immigrant groups and the ways they are addressed through public policy, we will briefly review some of the causes which may be at the origin of these inequalities.

A first approach argues that the inequalities immigrants face are the result of their position in the social and economic structure of the receiving society. Thus, immigrants share the same disadvantages as the most economically vulnerable groups in the autochthonous population. Without necessarily denying the specificity of problems faced by immigrants resulting from their adaptation to a

culture different from their own, this focus suggests that generic measures to fight social exclusion are the most effective way to reduce these inequalities. Therefore, the key factor to consider is the position of immigrants in the class structure of the receiving society, as the dominant issue that can affect immigrant groups is one of relative material deprivation (McAll, 1992; Portes and Rumbaut, 1996; Portes and Zhou, 2005). This approach has, undoubtedly, made an important contribution toward explaining inequalities. What it suggests is that it is essential that studies utilize control groups from the native-born population of a similar socioeconomic background to that of the immigrant groups that are being studied.

A second approach focuses on the cultural and social particularities of immigrant groups as the source of the inequalities affecting them (Walters and Eschbach, 1995; Crutchfield and Pettinicchio, 2009). These include social practices such as types of family relationships, dietary habits, etc. In other words, understanding the inequality that affects different immigrant groups involves analyzing the specific characteristics of each group and understanding their customs and practices in daily life, especially in relation to the mechanisms of social protection. However, while specific socio-cultural characteristics may be a significant part of the cause of inequality affecting immigrant groups, this does not mean we can fall into simplistic arguments that “blame the victim” for the disadvantages they face.

A third approach explains inequalities experienced by immigrants as linked to the way agencies in charge of providing welfare benefits and social services operate. Of particular importance is the role of those responsible for policy and programme implementation, especially those who are in direct contact with users, the *street-level bureaucrats*. According to this explanation, professionals and employees in direct contact with the public play an essential role in the production – and resolution – of the gap between policy and practice. Utilizing ‘bureaucratic discretion,’ civil servants can introduce considerations and criteria of a personal and/or corporative nature in decision-making; for example, in the concession of a benefit or subsidy for an immigrant, or in the procedure to follow to have access to a solicited service (Lipsky, 1980). Discrimination because of racism or xenophobia would be included in this analytical framework, as civil servants motivated by their own prejudices may act in ways that have detrimental effects on the effective and equal access of immigrants to services. Studies published in the Netherlands (Ellermann, 2006), Spain (Martin, 2009), and Germany and the United Kingdom (Flam, 2007) provide evidence of the

existence of a gap between the values defending the extension of rights to immigrants and the restrictive practices that are actually implemented. Other studies, however, point to the possible positive effects of discretion through the practice of extending rights that contravene formally restrictive policies (Guiraudon, 2000; Moreno Fuentes, 2004). In the case of the Netherlands, Engbersen and his colleagues (1999) analyzed the implementation of a 1997 law excluding undocumented immigrants from all welfare benefits and found that the law was implemented in very different ways in different sectors. The authors attributed these differences to different levels of professionalization among civil servants. In sectors with higher levels of specialization and professionalization, such as healthcare or education, professionals in practice boycotted the law and continued providing services to immigrants regardless of their legal status. In contrast, in sectors with lower levels of professionalization such as social services or adult education, civil servants applied the law to the letter, excluding undocumented immigrants from services.

## 4.2. Managing diversity

Governments have addressed the specific inequalities faced by ethnically and culturally distinct immigrant populations in different ways. The ideal-typical models for managing diversity applied in different countries can be placed along a continuum ranging from *assimilation* to *multiculturalism*. The *assimilationist* paradigm sees the attainment of equal rights and opportunities by the foreign population as something which is influenced by their cultural adaptation to and acceptance of the basic principles of the political community in the receiving country. The end result of this process is greater cultural homogeneity within the national community. The *multicultural* model, on the other hand, aspires to integrate immigrants in the receiving society with the same rights and opportunities as native-born members of that society but without immigrants having to renounce their cultural identity. The end result would then be a pluralistic society in cultural and ethnic terms.

Once applied, these ideal models are expressed in two basic types of responses to the inequalities faced by the immigrant population. On the one hand, there are attempts to ‘normalize’ the access of immigrants to the general social protection system covering the entire population (*mainstreaming*). The basic

assumption behind this approach is that the inequalities experienced by immigrants are primarily related to their socioeconomic position, so that the response should be no different than that applied for the rest of the disadvantaged population. A second approach to inequality, in contrast, attempts to identify the special problems or needs affecting immigrants seeking access to services and create special programmes (*targeting*) in response to this. The basic assumption behind this approach is that given that the inequalities affecting immigrants are caused by cultural or ethnic factors, concrete measures adapted to their specific needs are necessary in order to achieve equality of results.<sup>(19)</sup>

Both ideal models and their practical implementation present important contradictions that can be summarized in what is called the ‘dilemma of recognition’ (De Zwart, 2005). Both recognizing and not recognizing the ethnic and cultural identity of certain groups can have negative repercussions for the objectives of such policies: the integration of immigrant groups. Therefore, governmental authorities are in a paradoxical situation which is difficult to resolve. In France, assimilationist (or republican) model par *excellence*, socioeconomic indicators are worse for immigrants than the native-born population. Although cultural and language deficiencies are often cited to explain the poor conditions of first generation-immigrants, these factors cannot explain the equally poor conditions of a second generation born and socialized in France. The lack of attention paid to equity in France has hidden the difficulties of access to social rights and the discrimination suffered by the immigrant population. Today we are witnessing a relative relaxation of the republican discourse in France due to the increasing recognition of the discrimination that exists toward certain immigrant groups within French society (Simon, 1999). On the other hand, in countries close to the multicultural model, such as the United Kingdom and the Netherlands, the implementation of special policies for groups with specific difficulties and aimed at reducing inequality, has been to a certain degree counterproductive. ‘Affirmative action’ policies require defining and recognizing the groups involved, and this necessarily means accentuating ethnic and cultural differences and therefore, stigmatizing these problematized groups. The multicultural model implies, then, the reification and reproduction of ethnic and national groups, encouraging their

(19) An intermediate position consists in identifying the special needs of the immigrant population, but responding to them through general services by adapting them to issues of access with complementary measures (Vermuelen, 1997).

segregation with respect to the rest of society, which is also reflected in their lower socioeconomic indicators and inequalities.

The problem of social inequalities affecting immigrant groups, as well as the role of the welfare state in reducing inequality and improving the integration of these groups into society, have not been explicitly addressed in Spain until very recently. To a large extent this is a consequence of the general lack of debate over equity in Spanish society, something in part explained by the short period of time since universal social protection programmes were established. Spain's limited experience as a country of immigration also means there has been little debate on ways to manage the diversity that accompanies foreign immigration.

At the state level, after certain initial experiences limited to essentially symbolic actions,<sup>(20)</sup> the approval in 2007 of a Strategic Plan on Citizenship and Integration (*Plan Estratégico de Ciudadanía e Integración* or PECEI) for 2007-2010 was a clear step in the direction of trying to develop an immigrant integration policy in Spain. The PECEI has basically been an attempt to establish a general framework to be used as a guide for the regional policies of Spain's autonomous communities for the integration of immigrants in Spanish society. Specifically, the PECEI contributes a series of concrete objectives in diverse areas (a number of them linked to the welfare state) with the financial support of the Immigrant Reception and Integration Support Fund (*Fondo de Apoyo a la Acogida e Integración de Inmigrantes y al Refuerzo Educativo*).<sup>(21)</sup> The essential objective of this policy is to 'ensure equality for immigrants through the full exercising of their civil, social, economic, cultural and political rights as well as their access to public services (particularly education, employment, social services, healthcare and housing) in equal conditions to those of the autochthonous population'. Inspired by the 'Common Basic Principles for Immigrant Integration Policy in the European Union' adopted by the EU in 2004, which define integration as 'a dynamic, two-way process of mutual accommodation by all immigrants and residents of Member States,' the PECEI expresses the will to 'ensure the immigrant population's access to public

(20) Both the 1994 Plan for Social Integration of Immigrants [*Plan para la Integración Social de los Inmigrantes*] and the 2001 Global Programme of Regulation and Coordination for Aliens and Immigration (GRECO) [*Programa Global de Regulación y Coordinación de Extranjería e Inmigración*] had no budget, functioning primarily as statements of good intentions.

(21) This is split equally between autonomous communities and municipalities to help finance social policies aimed at immigrant populations. Sixty percent of the fund is intended for reception and integration programs for immigrants, and 40% for educational enhancement programs. In 2005 the allocation for the fund was 120 million Euros, and 200 million were allocated in subsequent years.

services,...in equal conditions to those of the autochthonous population.’ In order to accomplish this, it proposes to ‘adapt public policies, particularly in education, employment, social services, health, and housing to the new needs generated by the immigrant population. This process must be both quantitative, responding to the increase in new citizens and users that must be attended to by public services, and qualitative, properly managing the diversity of new demand and including any intercultural elements that may be required.’

Along with the principles of equality, non-discrimination and citizenship, the PECEI establishes the ‘principle of interculturality, a mechanism so that persons of different origins or cultures can interact with esteem and respect for cultural diversity’. Thus, immigrants must respect existing basic values and social norms, but they are also invited to participate in the construction of a new ‘just, inclusive and cohesive’ society, in order to create a sense of belonging. Interculturality is conceived, then, as an approach far different from the assimilationist model, since it is based on respect for the diversity of individuals and social groups, but it is also removed from the excesses of the multicultural model because it aspires to prevent the appearance of cultural groups isolated among themselves (Cachon, 2008). Those who drafted the PECEI considered ‘interculturality’ to be intrinsic to the Spanish reality, a society made up of diverse cultures and organized politically into a state of autonomous communities institutionally reflecting this internal pluralism.

In order to adapt the structure of governance of migration policy to the reality of a decentralized state, the PECEI establishes the Higher Council on Immigration Policy (*Consejo Superior de Política de Inmigración*). Recognizing that competencies for many welfare policies correspond to the autonomous communities and that these are central to the development of an immigrant integration policy, the council tries to ensure that there is coordination between the various levels of state government.

Today, most of the communities have their own plan or programme for the social integration of immigrants residing in their community. Following the lead of Catalonia, which developed its first Interdepartmental Plan for Immigration (*Plan Interdepartamental de Inmigración*) in 1993, other regional plans began to appear starting in 2000. Their aim has been to coordinate and systematize already developed though previously disperse actions taken by the autonomous governments in order to encourage immigrant integration in diverse areas such as healthcare, social services or education. The starting

point for these plans is therefore the recognition that immigration is an issue affecting multiple public policy sectors, particularly in the area of welfare.

These regional integration plans are all very similar in their objectives and operating principles. The majority pursue equal opportunity (Martinez de Lizarrondo, 2008) based on 'normalisation' as the means to attain equality.<sup>(22)</sup> As was previously pointed out, 'normalisation' means not creating special mechanisms to serve the immigrant population but rather orienting them toward general services. It is, therefore, based on an individualist-universalist approach to rights, extending equal rights to everyone, instead of granting different rights to specific groups. This approach is applied through socioeconomic policies aimed at improving the social mobility of immigrants through universal or general channels available to the entire population.

The majority of integration plans contain social service measures, such as policies for initial arrival, access to social assistance and policies for reconciling work and family life. This aid oriented approach, reflected in the placement of integration services in social service departments, involves applying the operational methods of these departments, which are generally based on outsourcing the implementation of programme measures to private agencies (Carrasco and Rodriguez Cabrero, 2005; Tamayo and Carillo, 2002). In addition to budgets often being inadequate (Bonino, 2003), integration measures also involve a certain contradiction with the strategy of 'normalisation', as their execution through non-profit agencies involves the development of special measures. In any case, the very process of 'normalising' immigrant access to services available for the whole population requires a certain adaptation of these general services so that they can meet the needs of groups with specific difficulties (language, cultural practices, etc) for their direct integration through general channels.

The similarities among regional plans, while important, must also be qualified, as there are fundamental differences in the ways Spain's autonomous communities manage diversity. 'Normalisation', the guiding principle in all the regional plans for assisting immigrants, has faced considerable obstacles in practice. Most of these plans offer general measures combined with some degree of special measures designed for certain groups (women, youth) with

(22) The basic principles framing the regional integration plans are: equality of rights and opportunities, normalization, cross-sector approach, gender equity, decentralization and social participation (Pajares, 2007).



specific difficulties (in Murcia, the Canary Islands, Catalonia). While some are more pro-active (more direct intervention of public institutions, as in the Basque Country), others have adopted a more *laissez-faire* attitude (Madrid). Some favour more direct socialisation measures to encourage acculturation and the defence of the national community (Catalonia), while others favour maintaining the cultural identity of origin (Navarra, Basque Country). In addition, the communities that have a more differentiated political identity and that aspire to greater levels of self-government are those that demand greater powers in managing migration policy (Martinez de Lizarrondo, 2008: 22). An example of this is found in the statutes of Catalonia and Andalusia in regards to the administration of work permits.

The high level of decentralisation regarding integration policies leads to considerable inequalities between communities and municipal governments, as those communities with greater financial resources have greater capacity to develop programmes than those with budget difficulties (Aja, 2004; Tamayo and Carrillo, 2002). Consequently, immigrants, as well as the rest of the population, may experience considerable differences in accessing welfare services depending on where they live (Laparra and Martinez de Lizarrondo, 2008).

In this complex scenario of multi-level governance of integration policy, municipal governments have played the most important role in practice. In fact, it was municipal governments that began to develop plans for the reception of new immigrants starting in the mid-1990s, often in response to conflict situations they were unable to manage (Bruquetas *et al.*, forthcoming; Maluquer, 1997). Related primarily to policy areas in which municipal governments have competencies (social services, management of public space, local coexistence), local initiatives often emphasize the sociocultural dimension of integration. This level of government is also of particular interest because it is often where anti-immigrant attitudes first emerge among sectors of the autochthonous population and where political groups find it easiest to mobilize these sentiments in order gain power.

### 4.3. Inequalities and equity policies

In the following sections we will analyze the empirical data available on inequalities affecting immigrants in relation to different areas of social policy and we will look at the ways Spanish public administrations have responded to these inequalities.

#### 4.3.1. Healthcare

In the previous chapter we analyzed changes in immigrants' right to access the services provided by the Spanish National Health System (NHS), revealing the process by which this access had been extended to include practically all persons residing (registered) in the country. The formal universalization of healthcare does not, however, guarantee equal access to healthcare services for all social groups, as eligibility alone does not imply equal use of these services; nor does it mean that everyone receives the same level of service (Navarro and Benach, 1996). The fact that access to NHS coverage has not been recognized as a right automatically linked to residence in Spain is at the origin of many of the difficulties of effective access to healthcare for groups in more precarious administrative situations. In addition to being subject to different administrative procedures and exposed to a greater degree of administrative discretion, those accessing the NHS through assistance programmes do not have the right to pharmaceutical benefits, which means that they have to pay the full costs for medications or seek assistance from municipal social service programmes.

TABLE 4.1

#### Percentage of population that has not received medical treatment in the last 12 months despite needing it, and the reason given for this

	DID NOT RECEIVE MEDICAL TREATMENT	REASON GIVEN FOR NOT RECEIVING MEDICAL TREATMENT		
		ECONOMIC INABILITY	LACK OF TIME	PREFER WAITING
Spain	6.4	4.0	30.5	24.6
Rest of the EU-15	6.6	5.7	24.5	30.2
Eastern Europe	8.7	7.1	42.9	14.3
Latin America	8.4	13.8	53.9	13.8
Africa	5.0	10.0	30.0	10.0
<b>Total</b>	<b>6.5</b>	<b>4.5</b>	<b>31.4</b>	<b>24.1</b>

Source: based on data from the ECV 2004-2008.

As the data in Table 4.1 shows, immigrants tend to state more often than Spanish nationals that they were unable to get the medical treatment they needed. The only exception to this pattern is found among African respondents, perhaps because of a different, culturally conditioned perception of the concepts of health and illness and/or because of different notions regarding the way to use healthcare systems based on experiences in their countries of origin. The reasons cited by nationals and foreigners to explain the lack of access also reflect differences. Foreigners, for example, are more likely to relate not receiving medical attention to a lack of economic resources and time; they are also less likely to relate their lack of the use of the healthcare system to a preference to wait for the illness to take its natural course.

The percentage of persons without access to a dentist is higher than for healthcare among all groups. All foreign groups state that they have more difficulty covering their dental needs than the autochthonous population. The reasons cited, in this case, are fundamentally economic, which is explained by the limited dental coverage provided by the NHS.

TABLE 4.2

**Percentage of population that has not gone to the dentist in the past 12 months despite needing to, and the reason given for this**

	DID NOT GO TO THE DENTIST	REASON GIVEN FOR NOT GOING TO THE DENTIST		
		ECONOMIC INABILITY	LACK OF TIME	PREFER WAITING
Spain	8.8	54.6	12.9	5.0
Rest of the EU-15	10.5	69.9	14.5	3.6
Eastern Europe	13.6	62.5	15.6	1.6
Latin America	14.2	75.6	13.6	1.2
Africa	13.4	81.4	4.7	–
<b>Total</b>	<b>9.0</b>	<b>56.3</b>	<b>12.9</b>	<b>4.7</b>

Source: based on data from the ECV 2004-2008.

Beyond the immigrant population's right to healthcare and the formal and informal obstacles faced in accessing healthcare services, it is also important to examine differences in the use of the healthcare system. Inequalities in the use of services related to social class are well-known. Lower socioeconomic

classes tend to have less access to preventative services, wait longer to see specialists and are more likely to use emergency services (Regidor *et al.*, 2002; Palanca, 2002). These disparities can be explained by the educational level of potential patients, differences in time availability and/or the existence of co-payments for some services (for example, for certain eye care and dental care). These factors point to the existence of external conditions that are beyond the control of patients, which lead to different opportunities for access to healthcare based on income and/or education level.

As can be seen in Table 4.3, members of households whose primary breadwinner is a worker or salaried employee stated that they had gone to the primary care or paediatric clinic an average of 1.21 times in the four weeks prior to the interview; the frequency is slightly lower for members of households whose main breadwinner is an executive or employer, with an average of 0.97 times. The proportion is reversed in the case of appointments with specialists (0.66 times for executives or employers and 0.5 times for salaried employees).

The use of emergency services also seems to vary among social classes: while 25.7% of executives or employers and/or their families had gone to an emergency room in the 12 months prior to the interview, 32% of salaried employees had done so. The use of private health insurance is also significantly different: 32% of households headed by executives or employers have mixed healthcare coverage (making it possible to use both the public and private healthcare systems), while this percentage decreases to 9% among salaried employees. In line with what has been indicated regarding the existence of disparities in access to healthcare based on social class, 16.6% of members of households of executives or employers that had been hospitalized stated they had been on a waiting list for treatment, while this percentage rose to 30% for members of households of salaried employees.

TABLE 4.3

### Use of healthcare services by socio-professional category (in the previous four weeks)

CATEGORIES*	PERCENTAGE THAT HAVE VISITED THE DOCTOR	AVERAGE VISITS TO PRIMARY ASSISTANCE OR PAEDIATRICS	AVERAGE VISITS TO SPECIALISTS	PERCENTAGE THAT HAVE GONE TO THE EMERGENCY ROOM (LAST 12 MONTHS)	PERCENTAGE THAT HAVE MIXED HEALTHCARE COVERAGE (PUBLIC AND PRIVATE)
I	33	0,97	0,66	26	32
II	36	1,10	0,61	31	21
III	39	1,13	0,59	30	15
IVa	39	1,17	0,50	32	8
IVb	39	1,21	0,48	32	9
V	41	1,19	0,48	32	4
Not known	40	1,15	0,70	33	17
<b>Total</b>	<b>38</b>	<b>1,15</b>	<b>0,54</b>	<b>31</b>	<b>13</b>

Note: The percentages do not add up to 100 because they are responses with multiple answers.

\*I: Managers of public administration agencies and businesses with 10 or more employees, professions associated with university and post-graduate degrees. II: Executives of businesses with less than 10 employees, professions associated with university associates degree/two-year degree, advanced technicians, artists and athletes. III: Administrative and professional employees in support of administrative and financial management, personal service workers and security, self-employed workers, supervisors of workers in manual labour. IVa: Skilled manual workers. IVb: Semi-skilled manual workers. V: Un-skilled workers.

Source: based on data from the ENS 2006.

Differential use of health services by the immigrant population can be largely explained by socioeconomic situation. However, although immigrants and autochthonous workers share the same user profile, there are undoubtedly particular factors related to the specific cultural differences of each immigrant group and to their previous experiences with healthcare systems in their countries of origin. Data from Spain's National Health Survey (*Encuesta Nacional de Salud* or ENS) in 2006 provides us with some interesting information regarding the differential use of health services by these groups.<sup>(23)</sup>

(23) Unfortunately, the survey does not allow us to focus precisely on the immigration population, although it does undoubtedly provide us some important information regarding this population.

TABLE 4.4

**Use of healthcare services by nationality (in the previous four weeks)**

	PERCENTAGE THAT HAVE VISITED THE DOCTOR	AVERAGE VISITS TO PRIMARY ASSISTANCE OR PAEDIATRICS	AVERAGE VISITS TO SPECIALISTS	PERCENTAGE THAT HAVE GONE TO THE EMERGENCY ROOM (LAST 12 MONTHS)	PERCENTAGE THAT HAVE MIXED HEALTHCARE COVERAGE (PUBLIC AND PRIVATE)
Spanish	40	1.15	0.55	31	14
Foreigners	29	1.08	0.46	32	9
Not known	31	1.12	0.51	32	21
<b>Total</b>	<b>38</b>	<b>1.15</b>	<b>0.54</b>	<b>31</b>	<b>13</b>

Source: based on data from the ENS 2006.

Differences in the use of the healthcare system are significant, as can be seen with primary care services, as shown in Table 4.4. While Spanish interviewees stated that they had visited the general practitioner an average of 1.15 times in the previous four weeks, foreigners reported having done so 1.08 times. Foreigners also reported a slightly lower frequency of appointments with specialists (0.46 appointments) than the autochthonous population (0.55 appointments). Obtaining non-emergency tests produced the same differential pattern between the autochthonous and foreign populations (15.4% and 12.3%, respectively). Use of emergency services was slightly higher among foreigners, however, than among the autochthonous population. Regarding hospitalization and waiting lists, there does not appear to be notable differences. However, there do appear to be significant differences in the role of emergency rooms as a gateway to in-hospital treatment, as this was the way that 65% of foreigners who were hospitalized were admitted, compared to 57% of the Spanish. These data suggest a relatively different pattern of access to the healthcare system's services among the population of immigrant origin, and they are fully consistent with the findings of other studies (Fundación Pfizer, 2008; Regidor *et al.*, 2008).

The relationship between relative deprivation in a number of areas (income level, education, housing and environmental conditions, etc.) and state of health is well documented. As the empirical evidence regarding the existence of inequalities in healthcare shows, the disadvantaged are particularly vulnerable, suffering poorer health than the rest of the population (Daponte, 2005). Although the intricate interaction of factors (material, social, cultural, psychological and attitudinal) that cause the appearance of these gradients of health has not been fully elucidated, it is clear that this relationship works

through a complex two-way process; in other words, difficulties in living conditions impact negatively on individuals' health, and at the same time, health problems limit individuals' possibilities to fully develop their potential.

Data available on health inequalities in Spain, although not extensive, focus largely on disparities between regions (Benach *et al.*, 1998; Benach, 2002). Various studies have shown, however, that there is a significant health gradient among the different social strata: the most disadvantaged groups suffer a greater variety of illnesses, more serious illnesses and are more likely to suffer chronic and/or incapacitating illnesses (Navarro and Benach, 1996; Urbanos, 1999). Thus, in 1995 while 27% of the more affluent population stated that they were in 'poor health' (fair, bad or very bad health), the percentage rose to 40% among the most economically disadvantaged. Daponte reached similar conclusions (2005) in his study on education level and health: in 2001, those with a lower education level had two to three times greater risk of having poor health than did those with a university level education.

Similarly, morbidity surveys revealed a significantly higher incidence of a number of health conditions and illnesses (respiratory disorders, hypertension, diabetes or chronic illnesses) among the lowest social classes (Regidor *et al.*, 2002). Unemployment also has a similar effect on health inequalities as does social exclusion (Subirats *et al.*, 2004). The improvement in key health indicators among the Spanish population, parallel to the increase in aggregate socioeconomic level, does not appear to be distributed equally but rather in function of income level so that health inequalities in Spanish society have in fact increased (Regidor *et al.*, 2002).

TABLE 4.5

### Relative state of health of the population by geographic origin

Percentages

	FAIR OR POOR HEALTH	DISABILITY OR LIMITATION CHRONIC	ILLNESS IN DAILY LIFE
Spain	32.3	29.7	24.4
Rest of the EU-15	19.8	20.7	15.9
Eastern Europe	19.0	14.0	8.1
Latin America	16.9	13.6	12.2
Africa	25.1	18.4	13.2
<b>Total</b>	<b>31.5</b>	<b>28.9</b>	<b>23.7</b>

Source: based on data from the ECV 2004-2008.

Analyzing the data from the Living Conditions Survey (*Encuesta de Condiciones de Vida* or *ECV*) 2004-2008 makes it possible to study health inequalities in the Spanish population in greater detail and in particular, their impact on immigrants. This survey includes a question on ‘subjective health’ (how respondents evaluate their own general state of health), and two questions on ‘objective aspects’ of health: whether the respondents suffer from chronic illness and whether they have experienced significant limitations in daily life for reasons of health in the six months prior to the interview.

As can be seen, the health of the foreign population is generally better than that of the autochthonous population for each of the three indicators included in the table. Thus, we see that approximately one-third of Spanish nationals state that they are in fair or poor health, whereas this proportion drops to one out of four among Africans, approximately one out of five among Europeans and one out of six among Latin Americans. The results are similar with respect to suffering from a chronic illness or having experienced limitations in daily life for reasons of health. At first glance, these results seem to contradict the aforementioned literature, since a large number of immigrants are found on the lower rungs of the social ladder, with the worst jobs, the highest levels of unemployment and living in the most precarious social and material conditions, all of which would suggest that their health would be worse than that of the autochthonous population. The explanation lies primarily in the younger age of the foreign population, which is mainly made up of economic immigrants coming from developing countries, but also in the ‘self-selection effect’ associated with migration: individuals who decide to migrate are usually healthier than those who opt to remain in the country of origin.

In order to control for the effect of age on these differences, as well as for the relative impact of a series of sociodemographic factors on the probability of having poor health, we have carried out a series of multivariate analyses using a logistic regression model.<sup>(24)</sup>

The parameter most clearly related to poor health is unemployment. The unemployed are twice as likely to have fair or poor health as the employed;

(24) Intuitively, we can understand *odds ratio* as the probability of an event occurring in a particular group in relation to the probability of it occurring in another group. An *odds ratio* equal to one indicates that the probability of the event occurring is identical in both groups. When this value is greater than one, the probability of the event occurring in the first group (located in the numerator of the ratio) is greater than it occurring in the second group (the denominator of the ratio). When the value of the *odds ratio* is less than one, the interpretation is the opposite: the probability of the event occurring in the first group is less than the probability of it occurring in the second.



their risk of suffering from a chronic illness is 67% higher, and their risk of suffering limitations in daily activities due to a health problem is double. As a counterpoint, those who have attended university have a significantly higher probability of enjoying better health than those who do not have a university education; those who are married are also slightly more likely to have better health. All these factors are known in the literature on health inequalities, and the data from this survey confirms them.

TABLE 4.6

**Odds ratio for likelihood of experiencing some kind of health problem (for the members of a group or category in comparison with those not belonging to this group)**

	FAIR OR POOR HEALTH	DISABILITY OR CHRONIC ILLNESS	LIMITATION IN DAILY LIFE
UE-15	0.801	0.628**	0.886
Eastern Europe	2.509**	0.973	0.894
Latin America	1.419**	0.823*	1.034
Africa	1.376*	0.611**	0.659*
Unemployed	2.022***	1.671***	2.115***
Married	0.885**	0.934*	0.885***
University educated	0.499***	0.868**	0.664

\*Level of significance of 5%

\*\*Level of significance of 1%

\*\*\*Level of significance of .1%

Source: based on data from the ECV 2004-2008.

In relation to immigrant's health, we find that their relative advantage largely disappears if we control for age. Although the odds ratios are not statistically significant in some cases (possibly because of the size of the sample), the indicators we can take into consideration suggest that immigrants' relatively good health must be qualified. The risk of having fair or poor health is 2.5 times greater for East Europeans than for the Spanish; for Latin Americans, the risk is 41% greater, although their risk of suffering a disability or chronic illness is approximately 20% lower. The case of Africans is very similar; their risk of having fair or poor health is 37% greater than that of the Spanish, but their risk of suffering a disability or chronic illness is approximately 60% less.

The explanation for these results is also consistent with other studies on health inequalities and immigration. The relative advantage seen in Table 4.5 can be largely explained by the fact that the immigrant population is younger. Once this effect is taken into account, the immigrant population is more likely to manifest fair or poor health than the autochthonous population. This is due to their poorer living conditions. Despite this, immigrants tend to report fewer disabilities, chronic illnesses or limitations in daily activities because of the previously mentioned ‘self-selection effect’; the result of which is that those who leave their countries have better health than those who remain (individuals with health problems are less likely to migrate because of the uncertainty, risks and difficulties associated with migration).

In line with empirical data from countries with a longer tradition of immigration, it is to be expected that as the immigration population settles in Spain and the second generation grows up, their health indicators will deteriorate (to the point that they will have poorer health than the autochthonous population) due to their poorer living conditions.

As we have pointed out, health inequalities affecting immigrants are related to their living conditions in the receiving society, culturally determined practices and habits, and institutional factors related to the way the healthcare system operates. Intervention in these different dimensions regarding inequality takes different forms. While the healthcare sector may not have a direct impact on living conditions, it can have an influence on the habits and customs of different immigrant groups (although perhaps with limited success) through educational and informational campaigns targeting these groups. Regarding the institutional aspect, the intervention of healthcare authorities may indeed contribute to significantly reducing the barriers between immigrants and healthcare professionals by establishing linguistic or cultural mechanisms to facilitate communication. It is also very useful to train social work and healthcare professionals in the basic aspects of managing cultural diversity in their work. In this respect, there have already been a number of initiatives implemented by some autonomous community governments.

#### **4.3.2. Social services and the social safety net**

In the previous chapter, we analyzed a number of programmes falling under the generic heading of social services and the social safety net. Although there

is a lack of coordination among these programmes, they all share one common goal: they seek to facilitate social integration and individual autonomy. Although many of the programs included in this group of social protection mechanisms were established to meet the needs of all the population regardless of individual resources, their lack of financing and therefore human and material resources has meant that they have essentially become aid programs for disadvantaged populations or those at risk of social exclusion.

TABLE 4.7

**Percentage of population below the poverty line based on different thresholds, by geographic origin**

	THRESHOLD BASED ON HOUSEHOLD INCOME		
	60% OF MEDIAN	40% OF MEDIAN	25% OF AVERAGE
Spain	18.1	6.1	3.1
Rest of EU-15	24.0	10.2	6.2
Rest of Europe	21.5	12.3	6.9
Rest of World	29.6	9.5	5.4
<b>Total</b>	<b>18.8</b>	<b>6.4</b>	<b>3.3</b>

Source: Based on data from the ECV 2008.

As Table 4.7 shows, poverty rates among the immigrant population are much higher than for the Spanish population. Different economic thresholds or poverty lines have been used in studies on poverty to determine who is considered economically disadvantaged. If we adopt a relatively high threshold, such that we consider the poor to be those who have earnings below 60% of median income for the population, a little over 18% of Spanish citizens would be found in this situation, according to ECV data from 2008. For East European immigrants, the percentage below this threshold is three points higher, while for residents of the EU-15 it is six points higher. Immigrants from the rest of the world (Latin Americans, Africans and Asians) suffer a poverty rate of nearly 30%. When we lower the poverty line, setting it at 40% of median income, the poverty rate decreases to 6.1% for the autochthonous population, but it is more than 50% higher for those from the rest of the world (9.5%), and the rate is double among immigrants from Eastern Europe (12.3%). If we use an even more restrictive threshold, established at 25% of average income, the poverty rates are again cut approximately in half: more or less 3% of

the autochthonous population would be under this severe poverty line; almost 7% in the case of Eastern European immigrants and 5.4% among those from the rest of the world. We do not have more recent data to estimate evolving trends, but poverty rates today must be considerably worse because of the increase in unemployment, which particularly affects immigrants.

Analysis of the Social Services' User Information System (*Servicio de Información de Usuarios de Servicios Sociales*, SIUSS) database indicates that immigrants proportionately use social services much less than the autochthonous population. Thus, comparing the number and type of social service actions taken in 2008, provision of services to immigrants made up 6.4% of the total, which is a significantly lower percentage than their presence represents in Spain's population.

TABLE 4.8

### Number and percentage of social service interventions in different areas of action

CLASSIFICATION OF USERS	TOTAL	INFORMATION, GUIDANCE, EVALUATION AND MOBILIZATION OF RESOURCES	SUPPORT FOR HOUSEHOLD AND HOME ASSISTANCE	ALTERNATIVE HOUSING	PREVENTION AND SOCIAL INSERTION	COVERAGE OF BASIC NEEDS
Immigrants, refugees and asylees	139,684 6.4%	81,431 8.0%	4,074 0.9%	1,566 1.8%	14,693 11.2%	37,918 7.8%
Rest	2,042,218 93.6%	929,039 92.0%	451,528 99.1%	87,444 98.2%	116,296 88.8%	449,008 92.2%
<b>Total</b>	<b>2,180,830</b> <b>100.0%</b>	<b>1,018,024</b> <b>100.0%</b>	<b>455,530</b> <b>100.0%</b>	<b>88,970</b> <b>100.0%</b>	<b>130,897</b> <b>100.0%</b>	<b>487,406</b> <b>100.0%</b>

Source: based on data from SIUSS 2008 Report.

While recognizing certain limitations of the data,<sup>(25)</sup> it is also noteworthy that 60% of interventions involving immigrants had the objective of providing them with information regarding their rights or referring them to other institutions or bodies. In the case of Spanish citizens these actions represented

(25) As we saw in the previous chapter, this database includes information from 13 autonomous communities plus the autonomous cities of Ceuta and Melilla; therefore there may be a bias stemming from those communities that are not included (the Canary Islands, Castilla-La Mancha, Catalonia and the Basque Country). Moreover, the possibility of bureaucratic discretion must be taken into account in the generation of data by social workers who fill in the SIUSS application and who classify users into the different categories (a number of interventions with the immigrant population impossible to determine may have been classified under other intervention categories).

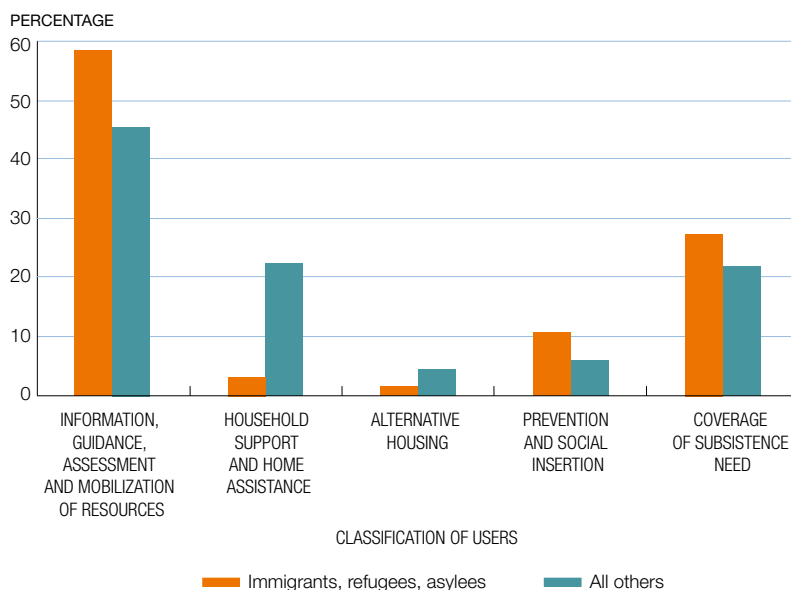
approximately 45% of interventions. The percentage of actions to facilitate beneficiaries' social insertion was nearly double in the case of immigrants in comparison with the autochthonous population (10.7% compared to 5.7%, respectively) and coverage of subsistence needs represented 27% of interventions for immigrants, compared to 22% for nationals. In contrast, interventions to support households or provide home assistance represented only 3% of the cases in the case of immigrants, compared to 22% in the case of Spanish nationals.

These distinct user profiles reflect both the younger age of the immigrant population and the self-selection of this population referred to in the previous section. Immigrant groups have much less need for domestic services (provision of care to dependent persons either due to age or physical or psychological disability). However, these differences may also point to different patterns of intervention by social services, which, following consultation and the assessment of immigrant cases, may divert these cases to third sector organizations which are thought to be better adapted to deal with immigrant users.

In the early 1990s, some municipal and regional governments began to develop systems specifically to provide social assistance to immigrants. These specialized services are generally based on setting up small support networks managed by third sector organizations and financed with public funds. The guiding idea behind such initiatives was that this way of operating would provide advantages in terms of knowledge, flexibility and ability to adapt to groups with differing needs. In addition, it was thought that working with third sector organizations would facilitate rapid intervention and the implementation of *ad hoc* solutions. Third sector social organizations would also contribute to introducing consistency in the actions of the various levels of government, merging them into their daily activity, combining funding sources, intervening through different projects with the same population group, coordinating with other entities, etc. The difficult balance referred to before between 'normalisation' through general channels and establishing specific schemes, is seen very clearly in the provision of assistance to immigrant groups on the part of social services.

GRAPH 4.1

## Comparative distribution of social service interventions between foreign and autochthonous populations



Source: Based on data from the 2008 SIUSS report.

In the face of government inhibition or hesitation, third sector organizations have often been the first to take the initiative, offering initial assistance to alleviate the most immediate social needs of disadvantaged immigrant groups (Gil Araujo, 2006). Furthermore, due to a general lack of knowledge in immigrant communities about how the system works and also because of problems of access to social services, it has been primarily through third sector organizations that immigrant demands have been handled. NGOs and immigrant associations have provided and facilitated different types of support services in the absence of public initiatives: provision of basic necessities (food or clothing), employment support (information, training, job banks, legal advice) and housing (residences, shelters for immigrants without resources or with specific problems). They have also taken action to raise awareness about these issues as well as to advocate for immigrant rights (Guillén *et al.*, 2002; Colectivo Ioé, 2004).

The danger of these types of schemes is that they are coordinated by the private sector (albeit non-profit), which for many represents an abdication of government responsibility. It is not a question of advocating uniform attention, but that the obligation of government is to ensure equal or equivalent treatment regardless of where assistance is provided. In addition, there is the risk of creating parallel networks specialized in assisting the immigrant population, which offer the same services and benefits as provided by the public social service network and meet needs not substantially different from those of the rest of the population. The creation of specific mechanisms also increases the risk of stigmatization and segregation of the targeted groups (Guillén *et al.*, 2002). This is a risk of particular importance, given the existence of a discourse which tends to blame immigrants for receiving preferential treatment from government services.

In the context of scarce resources for social services, situations may arise in which autochthonous beneficiaries are displaced by immigrants due to the application of need-based criteria.<sup>(26)</sup> This totally neutral process is, on occasion, perceived as treatment favouring immigrants. This perception of competition for public resources, which we will analyze in chapter 5, is in part the result of inadequate resource allocation for programmes facing growing demand due to an increasing population. Once again, it is not possible to calculate the magnitude of this problem due to a lack of data for programmes that are managed at the local level, as there is no centralized system for collecting and processing this data. However, this does not mean that we can ignore the importance of this issue as it can be easily exploited by opportunist politicians who want to capitalize on the feelings of vulnerability and distrust toward immigrants among certain of the most disadvantaged sectors of the autochthonous population.

### 4.3.3. Education

In addition to the tension between equality and freedom described in chapter 3, the Spanish education system is characterized by an inherent tension between equality and diversity. The cultural and linguistic diversity of the Spanish state itself raises the need or desirability for differentiated interventions for specific

(26) This can be extended to other areas of welfare not explicitly included in this study, such as daycare centres for children between 0 and 3 years of age, or subsidies to pay for school meals.

groups, schools or geographic areas. This tension has been exacerbated by the incorporation of immigrant students into classrooms in Spain.

Broadly speaking, immigrant students have poorer academic results than do their native-born classmates, both in terms of achievement (final levels reached) and performance (scores). Our data corroborates the findings from a long tradition of international studies which have shown that immigrant students have poorer academic results, higher drop out rates and lower retention rates at post-compulsory levels.

Regarding achievement indicators, in general immigrant students in Spain do not reach the same educational levels as autochthonous students. First, as we saw in chapter 2, only 10% of this group continues their education beyond the compulsory age (Lopez Pelaez, 2006). Moreover, the number of immigrant students in baccalaureate courses is less than half those doing Compulsory Secondary Education (Educación Secundaria Obligatoria or ESO) (CIDE, 2006). Although the difference between vocational training programmes, where immigrants represent 5.15% (23,389) of the total and the baccalaureate, where they represent 4.03% (25,382) (CIDE, 2006) does not seem great, it is significant that it is the reverse of the preference of autochthonous students for each of these levels of education.<sup>(27)</sup> We also saw in chapter 3 that there is a growing concentration of immigrant students in social guarantee programmes, set up for students who have not fulfilled the requirements of ESO.

Drop out rates for immigrant students are also higher than those of native-born students. A 2009 study on social inclusion in Spain (El informe de Inclusión Social en España 2009 [The Report on Social Inclusion in Spain 2009]) pointed out that the drop out rate for immigrant youth is 2.1 times higher than for students born in Spain (Mari-Klose, 2009.<sup>(28)</sup> This rate refers to leaving school after finishing ESO but without an upper secondary school diploma. In Catalonia, a study of 18 schools showed that 10.7% of recently arrived foreign students do not finish the academic year (Serra

(27) The education statistics from the Ministry of Education offer slightly different data for the same academic year (2006-2007): 25,120 immigrant students in the baccalaureate (4.1%) and 23,497 in vocational training programmes (3.9%).

(28) This study used logistic regression analysis to assess the influence and covariance of variables such as parents' education, sex, immigrant status and the autonomous region on the probability of dropping out of school.



and Palaudàrias, 2010).<sup>(29)</sup> Moreover, 42.5% of foreign students incorporated into ESO after so-called reception classes do not finish (Serra and Palaudàrias, 2010). The same study also found that immigrant students who go on to post-compulsory secondary education do the baccalaureate more often than vocational training programmes by a ratio of 8 to 1, even though only 5.8% of immigrant students who begin post-compulsory secondary education finish. Notable differences also appear in retention rates among students of different nationalities: those more likely to successfully finish ESO are Argentineans (80%), Colombians (65%), Moroccans (57.7%) and Romanians (53.5%).

Regarding academic performance, the data available in Spain also confirm that there is a gap between immigrant and native-born students. The primary source of data are the reports from the Program for International Student Assessment (PISA) (2000, 2003, 2006 y 2009), which supplies rigorous and comparative data on school performance of autochthonous and immigrant students in OECD countries.<sup>(30)</sup> A student is considered an immigrant if both his/her parents were born outside the country of residence, whether the student was born outside the country of residence (first generation) or not (second generation). The 2006 report in Spain was based on an evaluation of 20,000 students, which included a state-wide sample as well as samples from ten autonomous communities: Andalusia, Aragon, Asturias, Cantabria, Castile and Leon, Catalonia, Galicia, La Rioja, Navarra and the Basque Country.

(29) In addition to official data from the Department of Education of the Generalitat of Catalonia, Serra and Palaudàrias (2010) surveyed students in the 4th year of ESO and interviewed school administrators in their study.

(30) In 1997 the OECD launched the international PISA project (Programme for International Student Assessment) with the aim of comparing educational systems through a comparison of the performance of their students. Since 2000, PISA has evaluated the academic performance of 15 year old students in OECD countries in three fields: reading, sciences and mathematics.

TABLE 4.9

### PISA results on immigrant students' reading comprehension (point differential with autochthonous students)

	ACTUAL DIFFERENCES		DIFFERENCES CONTROLLING FOR SOCIOECONOMIC CHARACTERISTICS	
	SECOND GENERATION	FIRST GENERATION	SECOND GENERATION	FIRST GENERATION
Austria	-79	-48	-46	-21
Belgium	-81	-101	-42	-74
Denmark	-64	-79	-34	-47
France	-36	-45	-5	-19
Germany	-83	-70	-42	-39
Greece	-	-37	-	-17
Ireland	-	-14	-	-19
Italy	-	-69	-	-54
Luxembourg	-61	-69	-17	-29
Netherlands	-61	-65	-23	-40
Norway	-	-63	-	-40
Portugal	-	-69	-	-64
Spain	-34	-55	-7	-47
Sweden	-29	-68	-15	-48
Switzerland	-48	-65	-22	-60
United Kingdom	-7	-44	6	-34
OECD	-46	-51	-17	-35

Source: PISA Report 2006.

According to PISA 2006, 7% of students enrolled in Spanish schools were born outside of Spain, and their reading comprehension scores were 55 points below those of their autochthonous classmates (OECD, 2007). Moreover, if we control for students' socioeconomic status, we see that this gap remains high (47 points). Immigrant students perform worse than their native-born classmates of comparable socioeconomic status. This means that after adjusting the data for social class, a wide difference in scores must still be explained. Unfortunately, PISA does not distinguish between the scores of immigrant students from different origins. In PISA 2009, the difference between scores of immigrant (not born in Spain, i.e. first generation) and native-born students increased to 60 points. Again, the socioeconomic status of students explains only a small part of this variation, but still does not explain the 44-point gap between them.

TABLE 4.10

**Reading results of first and second generation immigrant students (PISA 2009): average scores and point differences with autochthonous students**

	AUTOCHTHONOUS	SECOND GENERATION	IMMIGRANTS (FIRST GENERATION)	OF IMMIGRANT ORIGIN (FIRST AND SECOND GENERATION)
Average for Spain	488	464	428	432
Difference in scores	–	–24	–60	–56
OECD Average	499	468	449	457

Source: based on data from PISA 2009 (OECD, 2010: 170; Table II.4.1).

In 2003 a study from the Spanish Ombudsman's office [*Defensor del Pueblo*] and the Spanish Commission for UNICEF [*Unicef-Comité Español*], directed by Ochaíta and Espinosa, revealed that immigrant students perform worse starting in the second year of ESO. Although they finish the fifth grade in primary school with lower scores than autochthonous students and then catch up with them in the sixth grade and the first year of ESO, starting in the second year of ESO there is a significant drop in the percentage of immigrant students in the appropriate educational level for their age (*Defensor del Pueblo*, 2003: p. 68, vol. II.).

Other studies at the regional level also show that immigrant students perform worse in school than autochthonous students. A study published by Anghel and Cabrales (2010) utilizing data from the Community of Madrid's 2006 through 2009 exams on *Competencias y Destrezas Indispensables* [Essential Competencies and Skills], reached similar conclusions. After controlling for parents' economic level, immigrant students still obtained worse results than nationals of a similar socioeconomic status. The 2006 Panel on Families and Children in Catalonia (*El Panel de Familias e Infancia 2006 de Catalunya*) also found that 33% of immigrant students received a failure mark in their final evaluation period, and 20% obtained passing marks (compared to 19% failures and 16% passing marks among native-born students).

TABLE 4.11

### Average marks of adolescents in the final evaluation period by country of birth

Percentages

	SPAIN	COUNTRIES WITH LOW OR MEDIUM GDP*
Excellent	5.7	0.9
Good	42.0	23.0
Satisfactory	17.0	23.0
Passing	16.0	20.0
Failure	19.0	33.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

\* Countries ranked below the first third in relation to GDP per capita.  
Source: Panel de Familias e Infancia of the CIIMU, 2008.

These and other similar studies have shown that there exist clear educational inequalities between immigrant and native-born students. However, it continues to be difficult to explain why this is the case (Montero-Sieburth and Batt, 2001; Stevens, 2007). One of the most important explanatory variables is social class.<sup>(31)</sup> The PISA studies (2000, 2003, 2006 and 2009) have demonstrated that students' academic performance is directly related to families' social, economic and cultural status. The education level attained by parents, particularly the mother, is one of the determinants of the results obtained by their children. In Spain, students whose parents did not complete compulsory education obtained scores 85 points lower than those whose parents attended university, according to data from the 2006 PISA Report. There is a 135 point difference between students coming from households with 10 books or less and those coming from households with over 500 books. This indicates that children are socialized through the cultural capital of their parents, by their parents' attitudes toward culture and education and by the cultural resources their parents offer to them (access to cultural activities, books in the home, etc).

(31) Generally, students' social class is understood in terms of the educational level of the parents or by 'cultural capital', measured through indicators such as level of studies completed by the mother or the number of books available in the student's home.

The cultural capital of parents is also correlated with retention rates, as the probability of children continuing their education after 16 years of age decreases when the parents have a low occupational status. Research on the general population has shown that while the participation rate in post-compulsory secondary education for children of parents with professional degrees is more than 85%, this decreases to 52% among children of skilled manual workers and to 27.5% among children of unskilled workers (Calero, 2006).

Portes, Aparicio and Haller (2009) in their study on immigrant students in Madrid found immigrant parents' average occupational status scores to be relatively modest: 93.4 for fathers and 81 for mothers, according to the occupational status scale created for Spain by Carabaña and Gómez Bueno, with a minimum score of 25 and a maximum of 266 in their sample. Mothers and fathers of immigrant students in publically-funded private schools (*escuelas concertadas*) had somewhat higher occupational and educational status than did parents of students in public schools. Average occupational status for mothers and fathers with children in these private schools was over 100 points on the scale, and 27% of these parents had attended university, compared to 18% of parents of public school students. Given the influence of parents' social, economic and cultural status on children's performance in school, it is to be expected that children tend to reproduce their parents' status in their performance.

The 2006 Panel on Families and Children in Catalonia also found the education level of immigrant parents to be generally below that of autochthonous parents. Immigrant parents are less likely to have a primary school certificate than autochthonous parents, have higher percentages of secondary education than do nationals and significantly lower rates of vocational training. At the same time, a greater proportion of immigrant parents have university education than autochthonous parents.

TABLE 4.12

**Education level of parents of adolescents by country of birth of child**

Percentages

	SPAIN	COUNTRIES WITH LOW OR MEDIUM GDP*
<b>Mother's education level</b>		
Without primary school education	5.4	11.0
Primary school	30.0	26.0
Secondary school	20.0	29.0
Vocational Training	20.0	6.4
University degree	24.0	29.0
<b>Father's education level</b>		
Without primary school education	5.7	7.8
Primary school	32.0	32.0
Secondary school	19.0	26.0
Vocational Training	20.0	9.8
University degree	23.0	25.0

\* Countries ranked below the first third in relation to GDP per capita.  
Source: *Panel de Familias e Infancia* of the CIIMU, 2008.

Despite the undeniable influence of parents' socioeconomic and education levels, these variables do not completely explain why the academic performance of immigrant students is worse than that of autochthonous students. It is true that the most pronounced differences are between foreign students with low socioeconomic levels and autochthonous students. However, there are also significant differences in performance among students from different countries, which cannot be attributed solely to differences in parent education levels among immigrants of different nationalities.

The relative difference between the results of immigrant and native-born students is greater when the immigrant students speak a language other than the language of instruction. The ratings gap with native students is also considerably higher for first- generation immigrant students than for second-generation students (a difference of 55 points versus 34 points in 2006 (PISA 2006) and of 60 points compared to 24 in 2009 (PISA 2009)). This suggests that the migration experience in itself causes an additional difficulty; particularly important are the age of arrival in the receiving country, level of

prior schooling and the degree of knowledge of the language of instruction (Alegre, 2008).

Given the high proportion of students from Latin America, the majority of immigrant students should not encounter major problems in school in the autonomous communities where the language of instruction is Spanish. According to the survey carried out in Madrid by Portes and colleagues (Portes *et al.*, 2009), 73% of students of immigrant origin interviewed said they speak Spanish perfectly and 23% said they speak it well; the responses were similar with respect to reading and writing. However, the study cited earlier, by Anghel and Cabrales (2010) for the Community of Madrid, shows that Latin American students obtain the poorest results of all the nationalities, even on exams on Spanish and dictation.

In addition, educational institutions and policies play a central role in explaining inequalities in performance. Above all, as was explained in Chapter 3, the stratification of the education system can reinforce or weaken school segregation and this in turn negatively affects school performance. Comparative research based on PISA data has concluded that differential systems (i.e., less comprehensive) tend to increase the inequalities in academic results resulting from students' social class (Duru-Bellat *et al.*, 2004; OECD, 2007). Inequalities in performance between immigrant and autochthonous students tend to be reinforced due to the high levels of school segregation caused by early tracking of students into itineraries or levels. Alegre and Ferrer (2010) in their comparison of 23 OECD countries based on PISA data looked at the relative influence of different variables on education systems. Their results confirm, first of all, that the socioeconomic composition of the student body largely explains academic performance, so that the higher the proportion of students of low socioeconomic status, the lower the average performance level in the school. But at the same time, they showed that the level of stratification of the education system reinforces the effect of class, in such a way that education systems that tend to track students at an early age produce higher degrees of school segregation, concentrating low-performing students (often with low socioeconomic status) in pathways of lower academic value (OECD, 2010; 41-43).

Another element of stratification in the education system that has negative repercussions on performance is diversity in the network of schools (public schools, publically-funded private schools and fully private schools). PISA data

show that in Spain the difference in mean scores by type of school favours private schools by 38 points. But if the effects of the PISA index of economic, social and cultural status are taken into account in analyzing student results, the differences among schools are not statistically significant. This indicates that quality of instruction in the different schools is comparable and, therefore, that the difference in school performance is largely explained by the effect of student social composition. The pronounced educational segregation between public and private schools that exists in Spain, therefore, has significant effects on the educational opportunities of immigrant students.

The literature also points to the school as a possible source of inequality. According to Bourdieu's *theory of reproduction*, the school plays a basic role in social reproduction, since it assumes the culture of the dominant groups to be the standard, making access to educational qualifications difficult for those students who do not have the legitimate cultural capital (Bourdieu and Passeron, 1970). However, other studies have shown relative variations among schools in the same country. The so-called "school effect" has opened debate on the extent to which the influence of schools on educational outcomes depends mainly on the socioeconomic and ethnic composition of students (Coleman, 1966) or more on the organizational and pedagogical structures adopted in each school. The study done by Alegre and Ferrer (2010) showed that the margin of autonomy schools have in the admission of students and in their distribution by level has significant effects on school segregation. These authors conclude that schools' *student* selection strategies can accentuate inequalities more than families' *school* selection strategies.

Finally, we can examine the role played by culture and language in differences in performance among different immigrant groups. In the previously cited study of Anghel and Cabrales (2010) carried out in the Community of Madrid, these authors found important differences in academic performance among students of different nationalities after controlling for parents' education level. Thus, despite the fact that immigrant students overall do not perform as well as autochthonous students, Chinese students had better results in maths than Spanish nationals; Romanians obtained better results in dictation, maths and language, and Latin Americans had poorer results on all areas of the exam. Moroccan students were on the same level as autochthonous students in maths and general culture, but their results were lower in dictation, reading and



language. Analyzing PISA data, it could be argued that Chinese students obtain very similar scores in all countries. These differences are a refutation of more nuanced versions of *cultural deficit theory* from the 1970s, which blamed school failure largely on differences between the languages spoken in the home and at school. Studies based on this theory associated poor educational performance (and also the lowest scores) with students' loss of their native language and the fact that the discontinuity between the language experiences in the home and at school confused immigrant students, which resulted in lowered academic aspirations (Ogbu, 1987). However, the findings of Anghel and Cabrales show that not all national groups perform poorly; moreover, their findings indicate that Latin American students are those with the worst results. We cannot, therefore, assume that the linguistic and cultural codes of immigrant students in general do not meet the standards of the Spanish education system; instead, we should explore to what extent the differences found by Anghel and Cabrales are related to the specific expectations and attitudes toward education among immigrants from different cultures.

From another perspective, some authors have introduced the role of *ethnic identities*, not only in terms of immigrant students' identification with their culture of origin but also in terms of the support provided by their ethnic or national communities (Portes and Rumbaut, 1996). The previously cited survey of Portes, Aparicio and Haller (2009) concluded that immigrant adolescents' friendship networks tend to reinforce ethnic identities. They found that less than half of immigrant adolescents' friends were born in Spain and the majority were from the same country or region of the respondent. This information is hopeful in terms of immigrant academic performance in Spain, as the studies of Portes and others carried out in the United States showed that immigrant students who maintained contact with their cultures and ethnic group of origin obtained good academic results, while those that assimilated into North American culture had significantly lower academic performance (Portes and Zhou, 2005).

Public policy in Spain has addressed the educational inequality faced by immigrant students and its possible causes. Although the underlying principle of the Spanish education system is equal treatment for all, the recognition of linguistic and cultural identities — crucial in the construction of the state of autonomies — has created a certain tension. Those responsible for designing

education policy have had to look for formulas to balance the objectives of equality and cultural diversity. The Organic Law 1/1990, of October 3, on the General Ordering of the Educational System (*Ley Orgánica de Ordenación General del Sistema Educativo* or LOGSE) was the first education law that explicitly mentioned the need to oppose ethnic and cultural discrimination (Terrén, 2001), but at the same time it aspired to create a system that would compensate for inequalities without relying on parallel structures for disadvantaged students (Grañeras *et al.*, 1997). In other words, the LOGSE assumed a concept of diversity that emphasized individual diversity and ignored socio-cultural differences between groups (Aja, 2000).

A similar orientation was followed by the Compensatory Education Programme (1983) (*Programa de Educación Compensatoria*), which was inspired by the ‘priority education zones’ in France that gave preferential attention to geographic areas or population groups with special educational needs. Although the implicit focus of this programme was the Roma minority, the official text did not refer explicitly to ethnic and cultural diversity as a cause of educational inequality; instead it focused on socioeconomic variables such as poverty and marginalization. Starting in 1986-1987, the programme was expanded to also include Moroccan students in the Raval neighbourhood of Barcelona (Ubero, 1997), and it continued expanding its target population to include immigrant students up until 2003 when it disappeared.

This indicates that initially programmes for the reception of recently arrived immigrants employed educational tools specifically designed for the Gypsy population (Garreta, 2006). The integration of the Roma minority in the Spanish education system went through several phases. During the Franco dictatorship, they were excluded from the education system; this was followed by a period of segregation in the ironically named ‘bridge schools’, and finally the Compensatory Education Programme was developed to promote the inclusion of Roma students in ordinary schools (Fernandez Enguita, 1996). Interestingly, internal migrants coming from other regions of Spain were treated differently from Roma and foreign immigrants. In Catalonia, for example, while students from Andalusia or other regions were included in immersion programmes in the ‘schools for minimum Catalanization’ (1983) (*‘escuelas para la catalanización mínima’*), foreign students were enrolled in

compensatory education classes together with students with diverse educational problems (Siguan, 2000; Pascual, 1998).

Regarding the specific challenges of foreign immigrant students, education authorities from the central and regional governments have also taken *ad hoc* measures. To promote a more equitable distribution of students among schools, most autonomous communities have designed various measures to regulate school enrolment (Alegre, 2008; Benito and Gonzalez, 2007). Municipal governments, also involved in education policy, have set up education commissions to manage policies aimed at equity in school enrolment. One primary measure consists of requiring schools that receive public financing to reserve a minimum number of places for special needs students during the registration period. Another option has been to require schools to reduce the class-size ratio during the registration period so that when the ratio is extended again, some places are available and may be filled by immigrant students who enrol after the deadline. This measure reflects the fact that a significant percentage of immigrant students enrol in school late. Finally, school zoning measures based on the creation of catchment areas for each school have been implemented so that admission into a school will depend on the family residing in that school's area. Zoning limits the ability to choose the child's school for all families, not just immigrants. There are three essential types of zoning: 1) a single zone in which all schools receiving public funds share the same catchment area; 2) different zoning for each public school, with alternative zoning for publically-funded private schools; and 3) zones with more than one public school, with alternative zoning for publically-funded private schools (Benito and Gonzalez, 2007). A variant of this last model implemented in some Catalan cities consists of establishing zones with more than one public school and more than one publically-funded private school (Alegre, 2008).

In addition to all of the above, autonomous communities have used their competencies over education to develop compensatory policies specifically aimed at the immigrant student body (Garreta, 2006; Carabaña, 2006). When receiving newly arrived immigrant students in the schools, some communities have opted for an 'integrated' model in which immigrant students are included in mainstream education classes. Other regions have set up 'parallel' or 'mixed' systems, such as in Catalonia (reception classes), the Community of Madrid

(linking classes), Andalusia (temporary language acquisition classes), the Balearic Islands (reception programmes) and Castilla-La Mancha or Murcia (language support teams). In the parallel reception programmes, the newly arrived students must take reception classes for a limited period during which they are separated from autochthonous students until they achieve a minimum level of knowledge of the language of instruction. In mixed programmes, students also have specific reception courses which means that sometimes they are separated from autochthonous students; for example, they may attend a reception class in the morning and mainstream classes in the afternoon, or they may have reception classes for a certain number of hours per week and the rest of the time they attend mainstream classes.

In spite of the effort to accommodate diversity, various authors have pointed out that educational practice continues to be more assimilative than intercultural. As a result, there is a gap between educational practices and the discourse of cultural pluralism. Thus, despite the compensatory measures aimed at newcomers, the official curriculum has remained largely intact; teachers have introduced very little intercultural education, and in some regions immigrants are pressured to adapt to the culture and language of the host society (Gareta, 2006).

#### 4.4. Conclusions

Policies aimed at compensating for socially unjust inequalities pose normative dilemmas that are undoubtedly more complex than are initiatives that seek equality, as on occasion they involve the establishment of programmes directed only toward specific groups of the population. In this chapter we have seen how the settlement of an immigrant population in Spain has introduced paradoxes which are difficult to resolve; to the classic issue of redistribution between social classes, there is now the added variable of ethnic and cultural diversity (Young, 1990).

The autonomous communities have responded in different ways to inequalities in actions and outcomes affecting the immigrant population. In all, a large part of the response has been through general services that cover the entire population, based on an approach that aims to normalize the access of immigrants to social protection programmes. However, together with the priority given to normalized access to general services, regional plans also recognize the importance of

attending to needs arising from the migration experience and cultural specificities. It is here where regional plans essentially differ. The integration plans of various communities coincide then in the existence of an internal tension between the principles of equality and equity (Carrasco and Rodriguez Cabrero, 2005: 93), but differ in the type of solutions implemented.

There is a similar tension in the area of education. Education authorities have strived to find the best way to combine the incorporation of foreign students under equal conditions with the temporary use of parallel programmes. These efforts sometimes come into conflict with the views of native-born members of the society, particularly when they are aimed at promoting a more equal distribution of immigrant students among schools. Contrary to what is commonly believed, studies show that the presence of immigrant students *per se* does not lower the quality of education in a school, but rather, it is the socioeconomic composition of students in a school and the educational level of parents that significantly affect school performance. Thus, to reduce educational inequalities, it is essential to implement education policies to bring about an equitable distribution of students among all the schools in a town or city.

Finally, equity policies resulting from balancing these tensions are faced with the challenge of obtaining the necessary social support. Raising citizen awareness is easier when the data permits us to show that arguments about immigrants abusing universal social services are unfounded (in the case of healthcare, for example). The empirical evidence presented shows that arguments about the overuse and abuse of the healthcare system by the immigrant population are totally without basis; this is consistent with studies published on the issue as well as with official data from the NHS. Measures in response to the inequalities experienced by immigrants, however, face great barriers in acquiring social legitimacy. This is also the case with social services, as scarcity of resources leads to needs-based selection criteria in determining who receives benefits, which may lead to the perception among the autochthonous population that the allocation of benefits to immigrants is a form of favouritism.

## V. The role of immigration in the provision of care

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The majority of analyses regarding the role played by immigration in the evolution of the Spanish welfare state focus either on the demand dimension or on the financial balance resulting from the presence of immigrant groups in Spain. This involves studying immigrants as recipients of benefits and services of the state's social protection systems and trying to measure the relationship between what they receive and what they contribute to public finances. Other analyses emphasize the role of immigrants in providing caregiving services to dependent persons. In trying to provide a comprehensive analysis of the complex relationship between immigration and the welfare state we will try to combine both of these focuses. In this chapter we analyze the way in which the welfare regime, the labour market and migratory policy find an important area of interconnection in the caregiving sector.

In recent years we have seen a spectacular increase in the demand for personal care services. This is a result of demographic changes and the increasing participation of Spanish women in the labour market and the need to balance work and family life. In response to this situation there has been a parallel growth in the private market for personal services (domestic services and care for children, seniors and other dependent persons), above all in the informal sector. Given the weak level of public intervention in the reproductive sphere, Spanish women working outside the home have increasingly turned to hiring immigrants to cover domestic and caregiving tasks. This not only reflects important changes in Spain's caregiving model, but also radical transformations in the social division of labour, changes which could not have happened without the contribution of immigrant labour. Immigrant women have come to play an essential role not only in the participation of Spanish women in the labour force

and in how families function, but also in supporting and ensuring the sustainability of the welfare regime in Spain.

### 5.1. Crisis in the family caregiving model

As we saw in chapter 2, Spain is characterized by a Mediterranean welfare regime. A distinctive feature of this model is ‘familism’, in which the individual problems of members of the family network (such as unemployment, housing problems, illness, etc.) tend to be defined as ‘family issues’. This involves significant intra-familial transfers, both tangible and intangible (Moreno, 2001), through the sharing of resources and expenses (Petmesidou, 1996).

Particularly important in this regard is the redistribution of resources throughout the different stages of the life cycle, as well as the associated system of social expectations and commitments. In this context, parents accept the obligation to support their children until they can become economically independent and form their own families (Naldini and Jurado, 1996). Parents also use their own social capital to help their children find work and sacrifice a significant part of their assets to help them in becoming homeowners. After emancipation, family networks make it possible for mothers that work to pursue their careers thanks to the involvement of grandparents (especially grandmothers) and other relatives in domestic tasks and the care of young children (Moreno, 2001). In later stages of the life cycle, individuals count on their families for assistance in the case of illness or economic need. Beyond being a mere complement to social protection mechanisms, the family functions as the provider of care par excellence of social services (Parella, 2003).

A crucial role carried out by the family is the provision of care to children, the elderly, the sick and disabled. This work is referred to by the generic term ‘caregiving tasks’, which cover all types of assistance aimed at those who need the help of others to carry out daily activities (Martínez Buján, 2010), whether dependent persons, children or autonomous adults. Caregiving tasks can be carried out by the family, public services or through the purchase of services on the market. Based on data from the EDDDES survey on social protection for dependency (*Encuesta sobre Discapacidades*,

*Deficiencias y Estado de Salud*), Rodríguez Cabrero (2004) estimates that 61% of the individuals that provide personal care live in and belong to the household of the dependent person; in addition, the majority are family members (60.5%) and primarily, daughters (58%).

The sense of *well-being* that is generated in families is primarily produced by women<sup>(32)</sup> in so far as mothers, daughters, wives, daughters-in-law, etc. are the principal caregivers of children, parents, spouses and in-laws. Studies on time use (Durán, 1999) indicate that in all European countries women dedicate more time to domestic and caregiving tasks than men. The greatest differences between men and women in the number of hours dedicated to domestic tasks and caregiving are found in the countries of Southern Europe.

Currently, the family centred model of care is in crisis due to economic and sociodemographic transformations and changes in the structure of the Spanish family (Rodríguez Cabrero, 2004: 225). In the long run, these transformations will involve ‘new social risks’ (Taylor-Gooby, 2004) and may lead to the erosion of the contract between generations within Spanish families. The once robust mechanisms of intergenerational reciprocity, characteristic of the ‘familist’ regime, are being weakened. Intergenerational solidarity in the family sphere continues to enjoy social prestige, but the social and economic circumstances in which the family develops have changed. It is now increasingly difficult for individuals to dedicate the time necessary to care for other family members as may have been done up until recently. The generations of women that have cared for their parents, husbands, children and grandchildren have aged and now need to be cared for. At the same time, younger women’s aspirations and the daily dynamic of their lives do not seem to indicate that they will take on the same roles as their mothers and grandmothers.

The crisis in the model of caregiving is inseparable from the new sexual division of labour that began to develop in post-war European societies. The growing participation of women in the labour market is the clearest indicator of the passage from a sexual division of labour based on the male ‘breadwinner’ toward a model based on the ‘adult worker’ (Lewis, 2001). If in the former model men were responsible for paid work (the productive sphere) and women were in charge of domestic work (the reproductive sphere), in the latter model both

(32) While social welfare (social services and benefits) is oriented toward achieving well-being in terms of the satisfaction of basic needs.



persons carry out certain functions in the labour market and the family. In a certain sense, the life course of women has masculinised, driven by their massive incorporation into the labour market and their tendency to remain in it even after marrying and having children (Esping-Andersen, 2009). However, this transformation in the productive sphere has not led to an egalitarian division of reproductive labour, which to a great extent continues to be the responsibility of women. The function of the ‘housewife’ has not disappeared, but has been reconfigured and become part of a ‘double shift’, as women work both inside and outside the home.

In Southern European countries this new division of labour has developed at a slower pace, overlapping with the process of transition from an industrial society to a post-industrial one. As can be seen in table 2.5, labour force participation rates for women in Spain nearly doubled between 1976 (28.4%) and 2009 (51%). This increase is particularly significant among women between 25 and 54 years of age; in this age group the participation rate went from 29% to 77%, in other words, an increase of almost 50 points. This contrasts with women over 55 years of age, who barely increased their participation in the labour market during this time period.

TABLE 5.1

**Evolution of women’s labour force participation rates in Spain (1976-2009)**

YEAR AGE	1976	1980	1985	1990	1995	2000	2003	2006	2009	VARIATION 1976-2009	TOTAL PERCENT OF AGE GROUP 2009
16-19	48.57	39.97	31.97	30.25	21.77	20.78	18.40	23.73	16.09	-32.48	4.49
20-24	53.49	54.71	54.53	61.20	57.95	57.27	56.36	62.89	62.20	+8.71	6.57
25-54	29.07	30.40	35.62	47.87	56.47	63.50	66.01	72.21	77.38	+48.31	53.81
55 +	13.84	11.24	10.05	8.99	8.46	8.80	9.68	12.42	14.97	+1.13	35.13
<b>Total</b>	<b>28.53</b>	<b>27.77</b>	<b>28.96</b>	<b>34.56</b>	<b>37.86</b>	<b>41.73</b>	<b>43.15</b>	<b>48.56</b>	<b>51.70</b>	<b>+23.17</b>	<b>100.00</b>

Source: based on Economically Active Population Survey.

If we compare the trends in Spain with those of other countries we can see that Spain is the European country which has seen the greatest increase in women’s participation in the labour market in recent decades, gradually approaching

the parameters of the countries with a corporatist model, although still far from the patterns found among the countries with a social democratic model.

TABLE 5.2

**Comparative evolution of women's labour force participation rates**

	1995	1998	2002	2006	1995-2006
Germany	67.4	69.1	72.8	74.4	+7.0
Denmark	77.4	79.2	81.0	82.8	+5.4
Spain	42.0	46.8	57.0	67.0	+25.0
Finland	71.1	75.6	79.6	78.9	+7.8
France	60.0	68.7	72.4	75.9	+15.9
Greece	51.1	54.1	57.9	62.9	+11.9
Italy	49.0	50.6	56.1	61.1	+12.1
Portugal	71.0	73.6	76.2	76.6	+5.6
United Kingdom	69.9	72.1	74.1	74.3	+4.4
Sweden	81.6	76.7	82.4	82.1	+0.5
<b>EU-15</b>	<b>62.3</b>	<b>64.3</b>	<b>68.6</b>	<b>71.7</b>	<b>+7.4</b>

Source: based on Eurostat data.

The massive incorporation of women into the labour market has increased the problems involved in reconciling work and family life. Without the correlate equal participation of men in domestic tasks, the responsibility for care continues to be left to women, who are forced to find ways of reconciling both spheres. This issue is of critical importance in all European societies, but more so in Mediterranean countries where the state has traditionally delegated this responsibility to the family. In these countries, the tensions that women face, and particularly those that have the responsibility of caring for dependent persons, are considerably greater. A large number of women therefore interrupt their work careers after having children and face 'endless workdays' (Durán, 1986; Mari-Klose *et al.*, 2009). Moreover, families are forced to devote a substantial part of their income to purchasing domestic and caregiving services (Tobío and Díaz Gorfinkiel, 2003). In addition, new family models (single-parent families, reconstituted families, etc.) have emerged, which have altered the norms and expectations of intergenerational solidarity.

Reconciling work and family roles has led to a growth in the demand for personal care services. In particular, there has been an increase in the demand for the care of the elderly. Moreover, an ageing population means greater demand for services for the disabled, given that the incidence of dependency is much higher among the population over 65 years of age.

## 5.2. Caregiving policies and markets

The role that women and families have historically played in Spain as providers of care has been accompanied by very limited state intervention in support of families. This intervention has consisted of weak, fragmented and residuary social policies, together with the enforcement of families' legal obligations to care for their members (Millar and Warman, 1996; Naldini and Saraceno, 2008). In Spain, care policies are lacking in resources, particularly regarding community services. These policies are fundamentally based on cash transfers and only marginally on the provision of public services. One indicator of this is that the availability of places in public childcare facilities per capita in Spain is one of the lowest in Europe. This relative lack of public childcare facilities indicates that women's work providing care has been a substitute for the childcare services which the state provides in other European countries. Comparative data from the OECD for 2003-2004 shows that in Spain, 20.7% of children up to two years of age are in childcare, which is two percentage points below the average for all European countries. However, only 8.3% of children under three years of age are in public childcare centres, while 10.7% are in private ones (2006-2007).

The specialized literature has pointed out the correlation that exists between the development of social services and women's employment, emphasizing above all the important role of childcare services. The development of childcare services and facilities permits women to join the labour market (Esping-Andersen, 1990). Although some steps have been taken to increase the number of places available in public childcare facilities, there still seems to be a long way to go.

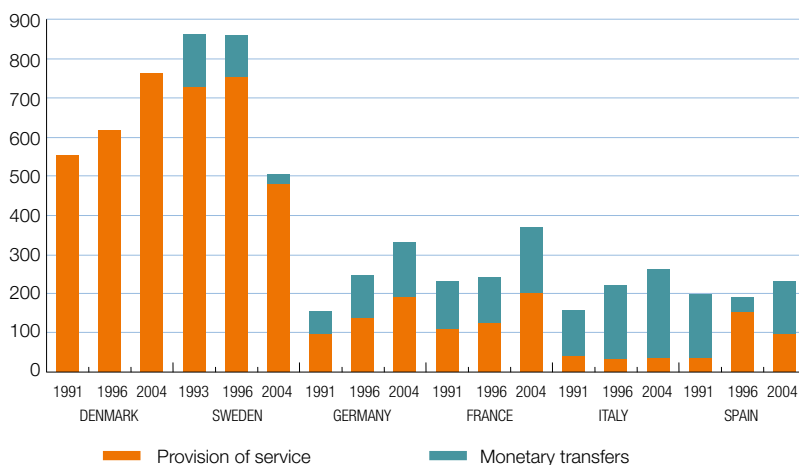
Policy aimed at reconciling work and family life in Spain has been focused above all on leaves for the care of family members as the primary instrument. These leaves fall under the framework of Law 39/1999 (*Ley de Conciliación 39/1999*) 'to promote the reconciliation of work and family life of employed persons'. Although this law gives both women and men the right to take paid leaves, it is primarily women who make

use of them. For example, in 2002 and 2003 only 1.4% and 3.8% of men respectively took leaves to care for their children or other family members (Caixeta *et al.*, 2004: 28). Without mechanisms that promote a change in mentality among men and fundamentally among employers, this law only reinforces traditional gender roles.

With an ageing population and a declining birth rate, the development of long term care services for the elderly has had a clear impact on women's labour market participation rates (Da Roit *et al.*, 2008). However, there have barely been any changes in the provision of services and development of infrastructure related to the provision of care in Southern European countries. The inadequacies of social policies in the reproductive sphere are particularly noticeable in the area of services for dependent persons and the provision of long term care, where the public system is by its very nature residual or secondary, with limited budgets oriented toward economic subsidies rather than the actual provision of services (Rodríguez Cabrero, 2004: 261). Thus, the network of local state-run residential facilities and assisted care facilities for the elderly is notably limited, while the majority of resources are taken up by long term care facilities (nursing homes, psychiatric facilities, etc.) (Costa-Fonty García González, 2007). In addition, despite the high number of highly dependent persons living at home, home assistance is barely developed, both in terms of quantity of assistance (number of hours offered per week) and in terms of coverage (around 3.4% of the population) (Da Roit and Castegnano, 2004). Graph 5.1 compares the differences in resources assigned to this type of assistance in a number of European countries, as well as changes in the proportion of resources allocated to cash transfers and the provision of services in these countries.

GRAPH 5.1

**Monetary transfers and spending in the provision of long-term care services by purchasing power parity (PPP) per capita (adjusted to 1995 prices)**



Source: Based on Eurostat data.

A key measure in this sphere has been the passage of the so-called “Dependency Law” (*Ley de Promoción de la Autonomía Personal y de Protección de las Personas en Situación de Dependencia*), which was approved after eight years of debate in 2006 (Costa-Font and García González, 2007). This new law defines the subjective right to receive care when a person is in a situation of dependency and establishes a common regulatory base for the benefits and services that the autonomous communities must provide. The very decentralized nature of the application of this law, as well as its implementation in a context of budgetary cutbacks, have led to a very slow delivery of programmes and a tendency to adopt mechanisms that lower the cost of care.

In this institutional context, the increased demand for care has not led to the creation of jobs in publically financed care giving services. At the same time, the private market is not a viable alternative for the majority of Spanish households, due to the high cost of private caregiving services.

TABLE 5.3

**Feminine employment rates in the caregiving sector (healthcare, assistance for the elderly, social services) by women under and over 50 years of age**

	1992		1995		2000		2005		2007	
	25-49	50-64	25-49	50-64	25-49	50-64	25-49	50-64	25-49	50-64
Germany	12.0	8.1	14.9	10.1	17.7	8.9	19.4	11.7	19.7	12.9
Denmark	23.5	17.1	30.1	20.5	31.9	29.8	29.9	30.9	31.4	30.9
Spain	5.4	–	7.0	2.3	8.6	3.3	10.2	7.3	10.9	8.4
France	12.7	5.4	15.5	6.4	16.6	10.1	19.5	16.2	20.1	16.7
Greece	5.1	1.4	6.6	1.7	7.4	2.1	8.2	3.1	8.9	4.0
Ireland	8.8	4.8	12.4	7.4	14.0	13.3	17.0	20.3	17.5	21.3
Italy	7.3	2.2	7.5	2.2	8.7	2.9	11.1	5.3	11.3	6.3
Netherlands	19.3	7.4	21.0	–	23.9	16.5	25.8	23.1	27.6	25.2
Portugal	6.9	–	10.5	6.1	10.8	5.2	12.7	7.2	13.0	8.8
United Kingdom	15.5	10.6	18.1	13.8	19.4	17.2	20.5	19.9	20.4	19.4
Sweden	–	–	36.6	–	33.3	–	27.4	31.8	27.2	31.3

Source: based on Eurostat data.

Table 5.3 shows that the percentage of women employed in the caregiving sector (understood in a broad sense and including healthcare, aid to the elderly and social services) has increased slightly in Spain over the last couple of decades, but remains low in comparison with more developed European countries (though in line with those of the Mediterranean regime). It is noteworthy that the percentage of women over 50 years of age that are formally employed in caregiving is particularly low in Spain, which suggests that the accumulation of informal responsibilities for care within families is an obstacle for the development of professional activities outside of the home.

This situation shifts the coverage of the potential demand for care and the consequent creation of jobs to the unregulated informal economy which offers lower labour costs. This niche in the Spanish labour market is being filled to a great extent by women immigrants primarily from Latin America but also from Eastern Europe and to a lesser extent, the Philippines and Morocco.

### 5.3. Immigrant women and the caregiving sector

After a gradual decline at the end of the 1980s and beginning of the 1990s, the level of employment in the domestic sector began a period of substantial growth in 1998, coinciding with the increase in immigration. In this context, foreign workers have come to represent between one half and two thirds of regular employment in the sector, and the great majority of these jobs are held by women. In 2004, 91.7% of new affiliates to social security under the regime for domestic employees were women (Villares *et al.*, 2005).

TABLE 5.4

#### Evolution of employment in the household sphere, by social security affiliates and EPA

	AFFILIATES IN THE DOMESTIC REGIME		EPA	
	DOMESTIC WORKERS	PERCENT FOREIGNERS	WORKERS IN HOUSEHOLDS THAT EMPLOY DOMESTIC SERVICE	PERCENT AFFILIATED WITH INSS
2004	184,193	41.3	591,400	30.6
2005	364,754	68.5	682,800	41.6
2006	300,134	61.0	760,600	44.0
2007	269,150	56.8	770,000	35.8
2008	286,027	59.6	–	–

Source: based on data from the EPA and the INSS.

Affiliates to social security through the regime for domestic employees have grown in concert with the processes of regularization of undocumented immigrants. Thus, the extraordinary regularization carried out between February and May 2005 can be considered to be largely responsible for the increase in the number of immigrant workers affiliated to social security through this regime. In comparison with previous regularization processes, the one in 2005 was particularly beneficial for workers in the domestic sector, as they could present their application for regularization if they could show that they had worked at least 30 hours per week for a period of six months (Da Roit *et al.*, 2008).

These affiliations are only the tip of the iceberg of a much broader phenomenon which escapes fiscal monitoring as it develops outside of legal employment channels, in part through employing undocumented women

immigrants (Da Roit *et al.*, 2008). The data from the Economically Active Population Survey (*Encuesta de Población Activa (EPA)*) gathered in table 5.4 shows that the rate of legal employment in domestic jobs ranges from 30 to 45%, in function of migratory policy, with the majority of this work remaining a part of the underground economy (for both immigrant and Spanish-born workers).

TABLE 5.5

**Evolution of social security affiliates through the domestic regime by nationality**

	2004	2005	2006	2007	2008	2009*
<b>Total affiliates</b>	<b>184,193</b>	<b>364,754</b>	<b>300,134</b>	<b>269,150</b>	<b>286,027</b>	<b>287,265</b>
Spain	108,045	114,732	116,958	116,347	115,683	113,760
<b>Total foreigners affiliated</b>	<b>76,148</b>	<b>250,022</b>	<b>183,176</b>	<b>152,803</b>	<b>170,344</b>	<b>173,505</b>
Rest of Europe	12,425	57,217	44,585	34,809	31,225	32,471
Latin America	49,659	161,110	113,831	94,501	110,062	111,877
Africa	7,706	21,992	15,249	13,424	16,206	16,247
Asia and Oceania	6,280	9,553	9,148	9,766	12,579	12,638

\* Data from December 31 for all years except for 2009, in which the data reflects the annual average.  
Source: based on data from the INSS.

Data on workers affiliated through the regime for domestic employees from 31 December 2008 indicates that 65.3% of immigrants employed in this sector are from Latin America. The three largest national groups are Ecuadorians, Bolivians and Colombians, making up 17.3%, 12.4% and 11.8% respectively of the total percentage of foreigners employed in the domestic regime. Along with these nationalities, a significant number are Romanian (8.5%) and Moroccan (7.24%). Other immigrant women that often find employment in this sector are from Peru, the Dominican Republic, Paraguay, Brazil, Argentina, the Ukraine, the Philippines and China, although women from these countries make up a small percentage of the total.



TABLE 5.6

**Principal nationalities among foreigners affiliated to social security through the domestic regime as of December 31 2008**

NATIONALITY	NUMBER	PERCENTAGE
<b>Latin America</b>	<b>–</b>	<b>65.39</b>
Ecuador	26,628	17.38
Bolivia	19,064	12.44
Colombia	18,115	11.82
Peru	9,257	6.04
Dominican Rep.	6,541	4.27
Paraguay	5,996	3.91
Brazil	3,333	2.17
Argentina	2,619	1.71
<b>Asia</b>	<b>–</b>	<b>6.74</b>
Philippines	6,764	4.41
China	2,274	1.48
<b>Africa</b>	<b>–</b>	<b>8.55</b>
Morocco	11,099	7.24
<b>EU</b>	<b>–</b>	<b>12.77</b>
Romania	13,151	8.58
<b>Rest of Europe</b>	<b>–</b>	<b>6.49</b>
Ukraine	6,767	4.42
<b>Total</b>		<b>100</b>

Source: based on data from the INSS.

Qualitative research indicates that these national groups occupy different positions in the domestic sector as this labour market is highly segmented by nationality: while some nationalities specialize in cleaning (non-live-in workers) and are paid by the hour, others fundamentally work in providing care to the elderly or children (live-in workers). This segmentation of foreign workers reflects a social hierarchy of jobs in the domestic sector. Non-live-in jobs are more socially valuable and in the majority are occupied by autochthonous workers, while live-in jobs involve much more difficult and often abusive working conditions. These are the jobs which no one wants, with long workdays, low wages, lack of a private life, etc. A study by Imserso (*Instituto de Mayores y Servicios Sociales* [Institute for Older Persons and Social Services]) estimated that 40% of the caregivers of the elderly were foreign women and that this figure reached 81.3% in the case of live-in

caregivers (Imsero, 2004). Although official statistics on the domestic sector do not differentiate between ‘caregiver’ and ‘cleaner’, these jobs greatly differ, both in terms of the training required as well as the intensity of the work carried out.<sup>(33)</sup>

Among immigrant women, the recent arrivals and the undocumented occupy the worst jobs. In the most difficult live-in domestic jobs some studies have documented a certain *ethnic succession* (Martínez Buján, 2008): as they become more settled and integrated, different national groups abandon live-in jobs, which are then taken by less integrated nationalities. In this regard, Martínez Buján (2008) shows that in 2004, 37.5% of foreign caregivers were Ecuadorian women, but after the regularization of 2005, 90% of these women received legal residence and their live-in jobs were taken largely by Bolivian women. This would also indicate that immigrants follow a typical pattern of a succession of jobs in their process of integrating into the Spanish labour market. Reflecting the widespread tendency of immigrants to enter the receiving country through the least regulated jobs in which employers have greater power to establish working conditions, recent arrivals initially take live-in jobs. In a second phase, they look for non-live-in jobs, save money, become documented workers and make plans for their families to join them. As the majority of jobs for caregivers are for live-in workers, this work becomes an employment niche for recent arrivals and for immigrant groups that are less settled or integrated, groups that have still not been able to regularize their situation and are therefore obliged to accept this type of employment (Martínez Buján, 2008).<sup>(34)</sup>

The previously cited Imsero study reveals that although 83.5% of families care for their elderly members without assistance (public or private), when they do decide to look for outside help they are most likely to hire a domestic worker, usually an immigrant woman. In general a domestic worker is preferred over a professional caregiver because the former do not limit their work to personal care, but also take on domestic tasks, such as cooking, shopping or cleaning. These are high-intensity jobs, particularly in the case of caring for

(33) For this reason, Martínez Buján proposes that we talk of the “domestic care sector” within the broader domestic sector; the former would cover only the work of “caregiving”, differentiating this work from the work of “cleaning”.

(34) It should be remembered that Raquel Martínez Buján’s research has been carried out in Galicia and Navarra, and that in other regions we may see other tendencies.

the elderly, which combine the tasks of maintaining the psychological well-being of the dependent person (providing company and conversation, etc.) with the physical tasks of cleaning the home or caring for an elderly person (hygiene, mobility).

Spanish families' demands for care structure the working conditions of their caregiving employees. Families prefer live-in employees that can respond to the needs of the elderly 24 hours a day. Therefore, in addition to working hours, there is what the law refers to as "on-call time", time agreed to between the employer and employee in which the latter has to be present and possibly respond to low effort tasks, such as answering the telephone. The research of Martínez Buján on Galicia and Navarra reveals that these live-in jobs as caregiver involve a high workload and a low salary – between 400 and 1000 Euros a month - (Martínez Buján, 2008: 107).

In addition, the choice of employees reveals clear preferences on the part of employers. Qualitative research on these preferences indicates that 90% of the demands for personal assistance in the caregiving sector are aimed at immigrant women (Martínez Buján, 2010). Qualitative studies also show that families prefer women, and they prefer Latin American women to provide care because of the shared language (Villares *et al.*, 2005).

Labour market segmentation among immigrants is influenced by the ethnic stereotypes of autochthonous employers, who choose a domestic employee based on their ideas about the home and the qualities necessary to carry out domestic tasks. The different immigrant groups are associated in the collective imaginary with specific characteristics, which makes them more or less appropriate as caregivers. A study by Caixeta *et al.* (2004) identifies certain dominant cultural stereotypes. Based on its results, Latin American women are considered 'sweet' but also 'liars' and 'not very hard workers', particularly Ecuadorians. Women from Eastern Europe, in contrast, are seen as 'disciplined' and capable of learning the language quickly but likely to have some relationship to organized crime networks. The stereotype of Moroccan women is that they are 'very dependent on their spouses' and they are seen as radically 'other' in the domestic space. Gavanas *et al.* also confirm these stereotypes in their study, observing considerable anti-Muslim sentiments which lead to perceptions of Moroccan women as 'untrustworthy' (Gavanas *et al.*, 2007).

Faced with social transformations which make the 'familist' welfare regime difficult to sustain, the weak public services and the inability to afford the cost of purchasing care on the formal market, the alternative for households is to resort to the unregulated market for caregiving services. As a result, female immigration has been used as a cheap and flexible solution to the growing demand for labour power in the caregiving sector. To access the labour market, Spanish women need to 'outsource' domestic tasks and the care of children, the elderly and other dependent persons. Work in the home and caregiving has been reorganized with immigrant labour playing a central role in structuring this new model (Imsero, 2004).

Functioning as 'servants of globalisation' (Parreñas, 2001), immigrants from developing countries fill the gaps left by the integration of Spanish women into the labour market. In this way a 'global care chain' is created (Hochschild, 2000; Ehrenreich and Hochschild, 2002) in which women from disadvantaged regions emigrate to care for the families of women employed in the regular labour market in Western countries, while with the money they send home, they support their own children, left in the care of family members back home. One might call it a 'care drain' copying the expression 'brain drain' from the traditional language on migration (Bettio, *et al.*, 2006: 272).

This new international division of reproductive labour or 'global care chain' is a global phenomenon with a particular effect on Southern European countries: Spain, Greece, Italy and to a lesser extent, Portugal (Martínez Buján, 2010). In these countries a new migratory model in which women play a leading role developed beginning in the 1980s. In contrast with the post-war migratory model in which the man, as the head of the household, emigrated alone to look for work and was followed by his wife and children later, in this new model it is women who are taking the initiative in migratory projects (King and Zontini, 2000).

The development of this source of employment is also connected to certain public policies which facilitate the employment of women immigrants as caregivers; research shows that there is a relationship between the establishment of direct cash payments to dependent persons and the employment of women immigrants in the caregiving sector (Williams, 2004). For example, France, Spain, the United Kingdom and Finland all introduced assistance to cover the cost of childcare in the form of direct payments or tax deductions (Lister *et al.*,

2007). In Austria, Italy, the Netherlands and the United Kingdom, the elderly and dependent persons receive direct payments to finance their home assistance (Ungerson and Yeandle, 2007; Bettio *et al.*, 2006). These monetary benefits in the form of both tax deductions and direct payments encourage the development of a private market for home care, characterized by high rates of informality and low wages. It is in this informal market where “global caregivers” find opportunities for insertion in the labour market, as they are willing to work under the precarious working conditions offered.

As a result, there is a direct relationship between the degree of formalization in the caregiving sector and the immigration of women. Regarding the former, the countries with a social democratic welfare regime and a higher degree of formalization in the caregiving sector offer a much smaller niche for immigrant employment. The countries with a corporatist model that use monetary payments in place of public services for providing care have generated a growing niche for the immigration of women. Finally, countries with a Mediterranean welfare regime have created an unfulfilled demand for care at home by leaving families to face this problem alone. However, they have now begun to create programmes providing monetary transfers to help families provide care at the lowest possible cost, which is generating a large source of jobs for ‘global caregivers’ (Kofman *et al.*, 2005; Williams, 2004; Lister *et al.*, 2007).

## 5.4. Conclusions

From what we have seen throughout this chapter the clear conclusion is that it has become increasingly difficult for the family to take on the tasks and responsibilities that ensure the viability of a welfare regime based on ‘familism’. If a new equilibrium between government intervention, the market and civil society is not established, an enormous deficit in the provision of care may be produced, one which will call into question existing relations of intergenerational solidarity.

Various authors have argued that the real crisis of the welfare state will in fact be a crisis over the provision of care (Myles, 1991). In European countries characterized by more advanced public systems for the provision of care, it is possible to distinguish a pattern of adaptation. Essentially, we see a trend toward budget cutbacks, the introduction of selection criteria for beneficiaries

based on the principle of 'need' and strict eligibility requirements, the subcontracting of services to the private sector, and an emphasis on informal care accompanied by cash transfers (Arriba and Moreno Fuentes, 2009). At the centre of this crisis, however, are those countries which up until now have found their equilibrium in the establishment of 'familist' regimes but that are currently seeing the social and axiological foundations of these regimes gradually vanish.

In this context, a new division of labour is consolidating. What was previously unpaid care provided by Spanish women, is now being outsourced to a private unregulated market in which immigrant women under precarious working conditions and with little professionalization provide care. The family model of care has been replaced by the model of "an immigrant in the family" (Bettio *et al.*, 2006: 272).

This informal solution appears to be helping to resolve the crisis of care in the short term, but it may be jeopardizing the development of a standardized and professionalized system of care. Thus, the emergence of an informal market for providing care, basically covered by immigrant women, raises challenges for the sustainability of the welfare regime, but also for shared responsibility, immigrant integration and social justice. In the face of such challenges, the state must assume greater responsibility for personal care services and regulate the market for them so that immigrant workers can obtain labour rights and legal residency instead of remaining in situations of illegality and insecurity.

## VI. The impact of immigration on the financial and social sustainability of the welfare state

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The analysis of the impact of immigration on social protection systems in the receiving country requires a focus on both economic and social dimensions. In this chapter we will first analyze the economic impact of immigration on Spain. Given the enormous complexity of this issue, our intention is only to provide a synthetic analysis of the principal implications of immigration on the financial sustainability of the Spanish welfare regime. We will then look at the evolving attitudes of Spanish citizens toward immigration, and in particular, toward the extension of social rights to immigrant groups. This is a key aspect, both in analyzing the legitimacy of policies extending rights to these groups (the correlation between opinions expressed by the citizenry and the nature of public policies) and in terms of the sustainability of social protection systems. In this regard, citizen alienation and loss of public support for these policies, resulting from a perception that welfare state programmes are abused by immigrants, translate into less willingness to pay taxes and support redistributive policies.

### 6.1. Immigration and the financial sustainability of the welfare regime

Because of their position as a link between the productive and reproductive spheres, social protection policies cannot be analyzed apart from the economic sphere which frames them. Any study on the impact of immigration on social protection programmes in a specific country must be based on a multidimensional analysis which takes into account the role of migration in the country's socioeconomic system.

### 6.1.1. Immigration, economic growth and the production system

Immigration has been an important stimulus to the Spanish economy over recent decades and has contributed to consolidating the country's social protection system. Between 2001 and the beginning of 2008, Spain's GDP grew at an average annual rate of 3.5%, creating more than 4.5 million net jobs (40% of the total generated in the EU-15 during this period), approximately half of them being taken by foreigners. Different studies have tried to quantify the effect of immigration on this period of economic growth. Given the complexity and multiplicity of factors to take into consideration, the conclusions reached vary regarding the impact immigration has had, although all of the studies point to the net positive effect of the arrival of millions of working age persons on the production system and public finances.

A report prepared by the Economic Office of the President in 2006, stated that 30% of Spain's GDP growth between the mid-1990s and the beginning of the new century was a result of the arrival and settlement of immigrant groups. This positive effect increased to 50% of GDP growth during the period between 2000 and 2005. The positive impact of immigrants is the sum of certain direct effects (increase in private consumption and the demand for housing, the increase in the overall labour force participation rate, changes in the demographic structure of the Spanish population, etc.), as well as a complex combination of indirect effects on the GDP (increase in the labour force participation rate among the autochthonous population, flexibilisation of the labour market, etc.). A study by the Caixa Catalunya savings bank also found that from 1996-2006 Spain's economy grew an average of 2.6% annually thanks to the contribution of immigrants (Caixa Catalunya, 2006). According to the model developed by the authors of that study, Spain's GDP would have fallen 0.6% annually over this period without the contribution of immigrants.<sup>(35)</sup> With somewhat different results, but also equally positive regarding the impact of immigration, Conde-Ruiz *et al.* estimated that more than 38% of the average annual growth in GDP at the national level during the period 2000-2006 could be attributed to the direct consequences of immigration (without including other indirect effects which also increased the

(35) The positive effect of immigration was produced in the majority of European countries, which, without the contribution of immigrants would have undergone annual declines in GDP per capita. The most significant declines would have been in Germany (-1.5%) and Italy (-1.2%), followed by Sweden (-0.8%), Portugal and Greece (-0.6%).



impact in an equally positive manner); in addition, the positive effect was even greater in certain autonomous communities (Conde-Ruiz *et al.*, 2007).<sup>(36)</sup>

As we saw in chapter 2, immigration has radically transformed the structure and functioning of the labour market and, thus, the Spanish production system. In broad terms, economic immigrants from developing countries are employed in economic sectors where there are jobs not covered by autochthonous workers. Immigrants have thus helped to introduce flexibility into the labour market and to reduce inflationary pressures in a period of strong economic and jobs growth. Thanks to immigration, employers have had cheap and flexible labour available and have increased their profits (Otero *et al.*, 2010). In line with the findings by the Bank of Spain in its 2006 annual report, Dolado and Vázquez (2008) point out that immigration has also helped to control inflation, thanks to immigrants' capacity to save and their influence reducing tensions over wages. At the same time, many Spanish families have enjoyed an increase in their standard of living thanks to lower prices for a large number of services, from access to personal care at a lower cost (domestic service, aid to dependent persons), as well as from increased household income resulting from the growing incorporation of Spanish women into the labour market. Freed from a part of their work and responsibilities in the reproductive sphere, which have been transferred to immigrant women employed for these tasks, Spanish women have joined the labour market en masse. Based on the calculations of these authors, inflation in Spain during the last decade would have increased 0.5% annually if not for the arrival of the immigrant population (Dolado and Vázquez, 2008). The Spanish economy, therefore, has benefited from an increase in general economic activity (increasing internal demand), from the containment of prices and from the maintenance of certain economic sectors that without immigration would have suffered serious difficulties in surviving in an environment of growing international competition (particularly agriculture, tourism and certain industries dependent on intensive labour).

This latter factor can be interpreted as a short-term advantage, as it permits a less traumatic transition to be initiated toward a different economic model

(36) By communities, the greatest effects were produced in the Balearic Islands (82.08%), La Rioja (69.61%), Valencia (60.41%), the Canary Islands (55.21%), Murcia (54.18%), Catalonia (45.24%) and Madrid (44.80%).

by cushioning the costs of the transition, but it also creates certain medium and long-term disadvantages. It is a disincentive for the introduction of new technologies and the investment of capital, as it perpetuates economic sectors of relatively low added value and therefore calls into question the future sustainability of the Spanish economy. The stagnation of productivity,<sup>(37)</sup> the general limited orientation of the economy toward international markets and the serious deterioration in balance of payments all raise the urgent need for a change in the economic model in which immigration will play an important role.

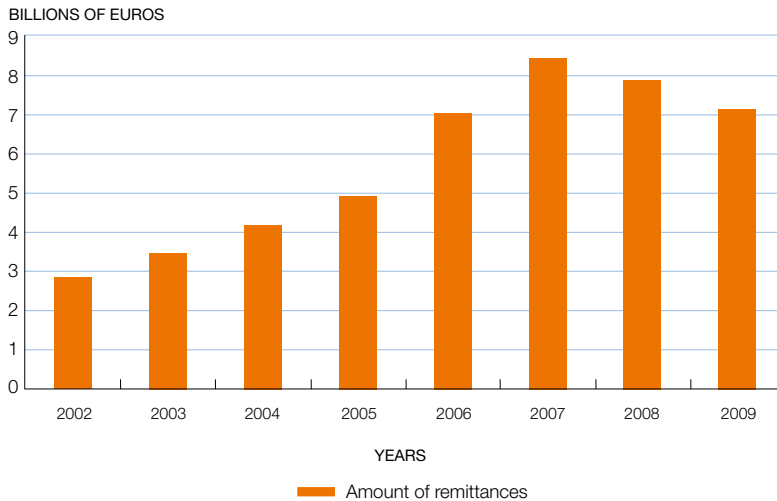
An additional element regarding the effect of immigration on macroeconomic parameters and in particular on the balance of payments is the role of monetary remittances. Just as the savings of the Spanish who emigrated contributed to providing foreign currency to the Spanish economy during the years of development, the remittances of emigrants to their families in their countries of origin constitute a transfer of economic resources which has an important impact on Spain's balance of payments.

The Bank of Spain estimates that beginning in 2004, Spain became a net emitter of monetary flows because of the growth in remittances from immigrants, in comparison to funds received from the Spanish residing outside of the country (Roquero, 2008). The amount of money that immigrants sent to their countries of origin grew 5.6 times between 2002 and 2007, increasing from slightly more than 1.5 billion Euros to over 8.4 billion Euros. This money is a result of the efforts and sacrifices of immigrants who delay their own gratification in order to send money to their families to cover basic needs and to invest in their society of origin. What constitutes on the one hand a reduction of potential internal demand, as well as an element of growing importance in calculations of Spain's balance of payments, is also a new element to consider in Spanish foreign policy (in particular regarding cooperation and development) as new types of connections are established with source countries of origin of migration flows towards Spain.

(37) The evolution of aggregate productivity in the Spanish economy for the period 1995-2007 shows a flat profile, with substantial gains in the agricultural sector, a slight, although up and down increase in the industrial sector and a significant decline in the service sector and in construction.

GRAPH 6.1

## Amount of remittances from Spain



Source: Based on data from the Bank of Spain.

### 6.1.2. Immigration and fiscal balance

The fiscal impact of immigration on public finances has also received some attention from applied social research. Beyond social security contributions and direct and indirect taxes collected from the immigrant population, as well as estimates of expenses attributable to the benefits and services provided to immigrants, analysis must also include the totality of wealth generated by the presence (and employment) of immigrants in the host society. Despite the absence of comprehensive research including all these parameters, the data we have available based on partial analyses clearly show the positive impact of immigration on public finances in Spain.

The previously cited 2006 report from the Economic Office of the President estimated that 50% of the budget surplus in public finances during the years of greatest economic growth (some 5 billion Euros annually) was a result of immigration. This report calculated that individuals of immigrant origin absorbed 5.4% of public spending (18.6 billion) and contributed 6.6% of total state revenue (23.4 billion), for a net contribution of 4.78 billion Euros, in

other words, half of the total surplus in the public sector in 2005. According to Dolado and Vázquez (2008), in 2008, state income resulting from immigration (income taxes, contributions to social security, sales tax and other special taxes, etc.) exceeded costs (in the form of unemployment benefits, pensions, education and healthcare related costs, etc.) by about 2 billion Euros, with the expectation that this positive balance would increase to 3 billion by the end of 2010. These authors also calculated that to the extent that demographic growth projections of the autochthonous population and migratory flows are accurate, this positive surplus will decrease to some 1.5 billion Euros annually toward the end of the next decade.

A report on the economic impact of immigrants in the Basque Country, published by the autonomous government of that region, draws similar conclusions as these studies. According to this report, the balance between the fiscal contribution of the immigrant population and the cost of social services and transfers immigrants receive results in a positive net per capita annual contribution of 1000 Euros more than the autochthonous population, without counting social security contributions, which are under the competency of the central government (Gobierno Vasco, 2008: 120).

Common to all groups of immigrant origin is their relatively unstable insertion into the labour market, as they often straddle both the underground economy and the formal economy but in situations of precarious employment and particularly difficult working conditions. In today's economic context, marked by an employment crisis, the surplus that the state enjoys as a consequence of the expansion of immigration will clearly decline. The concentration of immigrant workers in the economic sectors most sensitive to economic cycles, as well as the weakness of their family and community networks, leaves this population more exposed to the negative repercussions of the crisis.

Immigrants suffer higher rates of unemployment, are more likely to be overqualified for the jobs they hold and to be temporarily employed. However, five years after arrival, their rates of labour market participation begin to converge with those of the native born population. Their unemployment rate declines to levels even below that found for Spanish workers, while their rates of over-education and temporary employment remain approximately constant. In comparative terms between different immigrant groups, employment indicators for Eastern European immigrants converge more rapidly toward the

autochthonous population, while working conditions for African immigrants continue to be worse than those for nationals long after their arrival in the country (Dolado and Vázquez, 2008).

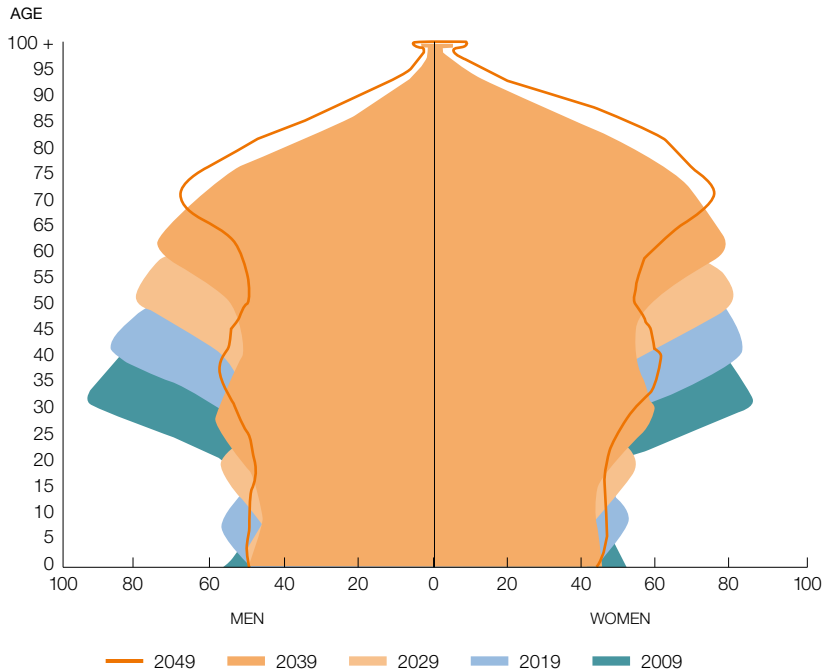
In 2008, immigrants from developing countries residing in Spain had a labour force participation rate significantly higher than that of the autochthonous population (81.2% compared to 72.6%) (Otero, *et al.*, 2010). This difference was clearly visible in the case of men (89.1% versus 82.1%), and particularly marked among women (73.3% versus 62.7%). According to Otero *et al.*, this meant that in 2008 immigrant contributions to social security alone (8.08 billion Euros), not including direct and indirect taxes they paid, were greater than all the social spending associated with immigration (6.5 billion Euros).

The present and future sustainability of the social security system is one of the areas most often mentioned when discussing the relationship of immigration to social protection policies. The general argument is relatively simple: if European societies, and among them, particularly Spain, are headed toward a significant increase in their rates of dependency (the ratio between the inactive population and the active population) as a consequence of the ageing of their populations, the arrival of economically active young people from other countries is one of the fastest and easiest ways to temporarily halt this process.

European countries are essentially becoming victims of a slow demographic time bomb. The increase in life expectancy and low birth rates, beginning in the 1970s (in Europe) and the 1980s (in Spain), have had a direct impact on social security systems, as the proportion of retirees is increasing, while the proportion of workers is declining. Given that there are increasing numbers of people receiving money from the system and fewer contributing to it, Spain's ageing society will not be able to meet its commitment to provide the retirement pensions promised to the workers who are currently contributing to the system without increasing their current contributions (which would depress internal demand and slow down economic growth, while also making Spain's exports less competitive) or reforming the social security system (there is a certain margin to delay the coming problems, but without resolving them structurally). The cost of pensions currently represents around 8.7% of GDP in Spain, and it is estimated that this could increase to 20% of GDP by 2050 (even if employment rates were to converge with those of the EU).

GRAPH 6.2

## Population projections for Spain



Source: INE.

Graph 6.2 shows the projections for the Spanish population calculated by Spain's National Statistics Institute, and it is easy to see how the gradual ageing of the population calls into question the sustainability of Spain's economy and therefore, the system of social protection as it currently functions. Based on these projections, if current demographic trends continue, the Spanish population will lose 3.4 million workers between the ages of 19 and 40 years of age over the period from 2010 to 2020, and the population over 65 years of age will double by the year 2050. For each person of working age there will be almost one potentially inactive person.

Several international institutions (UN, EU, and OECD) argue that international migration is one of the best and most feasible mechanisms to balance the social security budget in the near future. According to the European Commission, births in Spain during the next two decades will barely offset

deaths, and only the arrival of foreigners will increase the economically active population and the number of contributors to social security; thus, it will be necessary for Spain to receive at least seven million immigrants in the next 20 years if the dependency rate is to remain at 34%.

There are three main reasons why immigration could contribute to attenuating the negative effects of an ageing population. First, a net inflow of immigrants increases the total population of the receiving country. Thus, in 2001, over 74% of population growth in the EU came from immigration. In Spain, the proportion was even higher, slightly over 80%. Secondly, immigration has an immediate effect on the working age population, given that on average, immigrants are considerably younger than the autochthonous population. Finally, the first generation of immigrants tends to have more children than the native-born population, in this way contributing to increasing the total birth rate of the receiving country.

The bulk of population growth in Spain between 1992 and 2010 was in fact due to immigration. Between 1992 and 2005 the Spanish population grew by 4.3 million persons, 3.4 million of whom were immigrants (Pajares, 2007). Immigration has moderated the effects of the ageing of the population in Spain. The immediate consequence of this population growth, if we look at the age structure of the immigrant population, is the increase in the potentially active population. The year 1976 marked the end of a *baby boom* in Spain, and this meant that beginning in 1993, the number of young people age 16 is much lower than found in that preceding period. As a consequence, the fall of the birth rate each year affected a larger age group, and therefore each year fewer young people entered the labour market. The immigrant population, in their majority between the ages of 20 and 39, compensated for this decline in the potentially active native population.

Immigration has also had a clear demographic impact on the labour market. Persons of foreign nationality now make up more than 11% of the employed population in Spain, contributing to the increase in the labour force participation rate and in employment. According to data from the EPA, half of the 2.6 million new jobs created between 2001 and 2005 were taken by foreigners (Economic Office of the President, 2006). This growth in employment would have been impossible without immigration (Pajares, 2007: 22).

Despite the autochthonous active population barely growing, the labour force participation rate among the Spanish has grown, fundamentally thanks to the growing participation of women in the labour market. Traditionally, Spain has had female labour force participation rates well below the European average, to a great extent explained by the difficulty in reconciling work and family life. The employment of a large number of women immigrants in the caregiving sector has permitted many working age Spanish women to join the workforce. At least a third of the increase in the female economic activity rate is attributable to the increased presence of domestic employees of immigrant origin, who take on a part of autochthonous women's responsibilities in the reproductive sphere (Economic Office of the President, 2006). This can also be observed in the regions in which there has been the most immigration, as there has been a parallel increase in labour force participation among Spanish women (Conde-Ruiz *et al.*, 2007).

To the extent that immigrants contribute to the payment of pensions for the current generation of retirees through their contributions to the social security system, there is no doubt that immigration contributes to the financial equilibrium of the system. The arrival of more than four million immigrants has not only contributed to rejuvenating the economically active population, but has also increased the number of contributors to social security, the number of pensioners remaining constant, and is the reason why the public system has had a budget surplus of more than 1% in recent years. According to the 2006 report by the Economic Office of the President, immigrants in that year contributed 8 billion Euros to the INSS (*National Social Security Institute*), and received pensions worth 400 million. Based on the most recent figures from the INSS, at the end of 2010 there were 18.7 million contributors to the system, of which almost 1.9 million were immigrants (81% non-EU immigrants and 19% from other EU countries). The contributions of these immigrants have temporarily raised the ratio of contributors to pensioners to nearly 2.5 to 1. As a result, immigration will delay by almost five years — from the year 2023 until 2028 — the Spanish pension system's entry into a state of deficit, introducing a margin for action that will permit the necessary reforms to be made to guarantee the sustainability of the system (González *et al.*, 2009).

The conversion of immigrants into pensioners will begin in approximately 2030, but until at least 2045 they will continue to be net contributors to the



system, to a large extent because their pensions will be low, as their contribution base will have also been low. From that moment on, however, immigrant retirees will coincide with Spanish retirees of the *baby boom* generation, so they will be contributing to the increasing demand on the social security pension system. Different studies on this issue have come to the same conclusion: immigration has temporarily guaranteed the financial sustainability of the pension system, although at best, it leaves the solution to this problem to the following generation. In this regard, the contribution of immigrants is clearly positive, as it has postponed the social security deficit by several decades. Many of these immigrants, in addition, will not have spent enough time as contributors in Spain to benefit from a contributory pension, so they will only be able to opt for non-contributory benefits which are financed through the general state budget. This has multiple implications, as these pensions are considerably lower than contributory ones, and in addition, they shift the financial responsibility from the social security system to the state budget. These types of pensions also raise the issue of legitimacy, as the shift from a contributory logic to a logic of “national solidarity” leaves greater space for the politicization of the issue of immigrant access to the social protection system, initially designed for the autochthonous population.

There have been few foresight exercises regarding the evolution of the economy, the welfare state and the impact of immigration on both, but they confirm the analyses carried out in other countries that argue that the arrival of immigrants has an overall positive impact on public finances during the initial phases of the settlement cycle. This positive effect is gradually neutralized as the demographic profile of immigrant populations slowly converges with that of the autochthonous population. In this regard, the work of Otero *et al.* (2010) is pioneering in its presentation of a series of possible alternative scenarios for the year 2025. In these scenarios, based on different combinations of economic growth rates and rates of migratory flows, the authors propose a series of relatively clear conclusions. The first of these is that depending on the economic model adopted by Spain in the coming years and the rate of economic growth achieved during this period, the total volume of migratory flows to Spain will range between two and five million persons. The arrival of immigrant labour may vary considerably, but given the negative natural growth of the autochthonous population there will be demand for it in any case. This situation

will coexist with high unemployment rates especially among the immigrant population, resulting from the relatively low-skills of a large part of the immigrant workforce that has come to Spain in recent decades. In a context of increasing social spending, a result of the demographic transformations in Spanish society, the proportion of spending allocated to the immigrant population will continue to grow, but the net positive impact of immigrants on Spain's fiscal balance will remain (primarily as a consequence of their lower use of retirement benefits of a contributory character). In this regard, these authors calculate a 60% differential in social spending on the immigrant population in comparison to the autochthonous population.

### 6.1.3. Immigration, public administrations and social classes

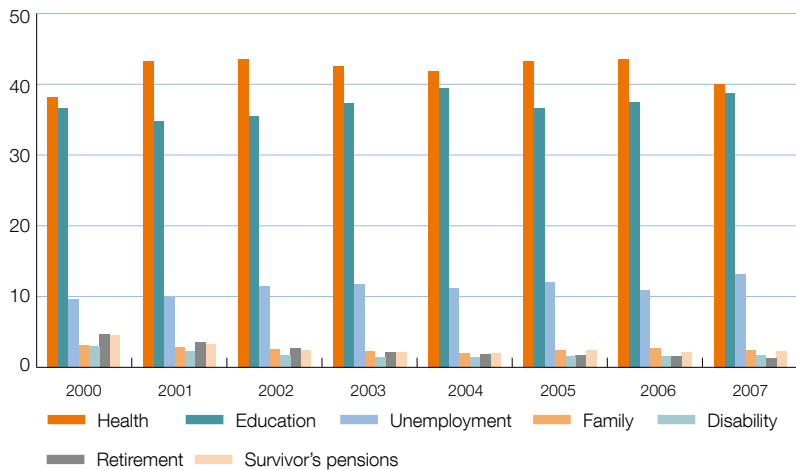
Although immigration leads to aggregate gains for the country, the multilevel structure of the government and the systems of finance between these levels can produce budgetary imbalances between public administrations with important implications for social protection systems.

As we have seen, the positive fiscal balance from immigration is largely generated in the social security system, which is under the control of the central state government. Similarly, income and sales taxes, which immigration can have a positive impact on, are also administered by the central government (with the exception of the Basque Country and Navarra, who collect their own taxes based on a system known as the *Concierto Económico (Economic Agreement)*), which subsequently distributes the agreed on percentages of revenue to the autonomous communities based on regularly negotiated regional financing agreements. In this context, the massive wave of immigration in recent years, along with the concentration of immigrant groups in certain communities, has led to a significant gap between the tax revenues generated by immigration and the expenses resulting from the increase in demand for certain services (healthcare, education, social services). Communities such as Catalonia, Madrid and Valencia, where the arrival of immigrants has led to rapid increases in the population, have had difficulties in responding to the additional demands for benefits and services because the finances received from the central government have not kept pace with their population growth. The benefits from immigration are clear at the macroeconomic level (budget surpluses in the general state administration between 2005 and 2007 are not unrelated to this process), while

tensions arise on the mesoeconomic (autonomous community budgets) and microeconomic (budgets for schools, healthcare clinics, hospitals, etc.) levels. The concrete risk from these processes is the deterioration of public services and their loss of legitimacy among the autochthonous population as a result.

GRAPH 6.3

### Distribution of social spending dedicated to the immigrant population (percentage)



Source: Based on data from Otero *et al.*, 2010.

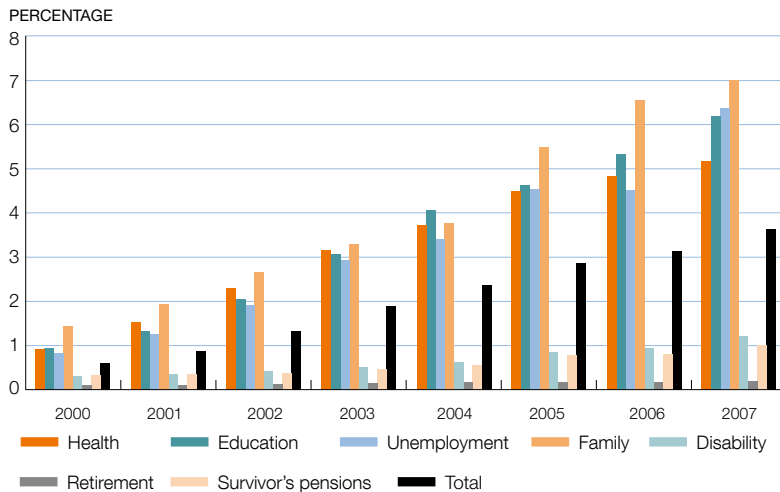
We can see in graph 6.3 that the main components of social spending among the immigrant population are related to healthcare and education. Although economic conditions introduce fluctuations in the composition of spending, these two spheres absorb a minimum of 75% of public spending aimed at this population. The other components (unemployment, retirement, survivors' pensions, disability allowances and aid for families) do not come to more than 25% of the total. The principal component of social spending for immigrants corresponds, therefore, to social protection programmes under the direction of autonomous community governments, whose budgets finance the costs of these programmes.

Graph 6.4 shows that the percentage of total social spending dedicated to the immigrant population has grown significantly over the period reflected. From

representing approximately 1% of spending for healthcare and education in 2000, this proportion has grown to 5% of spending on healthcare and 6% of spending on education in 2007. These percentages are below the proportion of the population represented by immigrants, but they clearly show how social spending linked to immigration, under the responsibility of the autonomous communities, has grown considerably in a short period of time without a proportional adjustment in financing from the central government.

GRAPH 6.4

### Percentage of social spending dedicated to the immigrant population



Source: Based on data from Otero *et al.*, 2010.

Tables 6.1 and 6.2 show how the autonomous communities have had to allocate different proportions of their resources to fund social programmes for immigrant populations.

While in regard to education spending there has been a general trend toward an increase of resources dedicated to students of immigrant origin (with some communities obviously dedicating greater resources due to the larger number of immigrants settled in their territory), in the area of healthcare there has been a much more noticeable increase in the cases of Catalonia, Madrid, and to a lesser extent, Valencia.

TABLE 6.1

### Percentage of healthcare expenditures dedicated to the immigrant population by autonomous communities

	2000	2001	2002	2003	2004	2005	2006	2007
Andalusia	0.54	0.78	1.11	1.60	1.89	2.50	2.85	3.01
Aragon	0.09	0.20	0.37	0.53	0.65	0.89	0.93	1.13
Asturias	0.05	0.07	0.10	0.14	0.17	0.21	0.21	0.24
Balearic Islands	0.14	0.24	0.42	0.62	0.72	0.96	0.87	0.98
Basque Country	0.13	0.19	0.29	0.39	0.46	0.58	0.64	0.80
Canary Islands	0.39	0.56	0.82	1.04	1.26	1.41	1.32	1.41
Cantabria	0.03	0.05	0.09	0.12	0.15	0.19	0.20	0.23
Castilla-La Mancha	0.10	0.21	0.39	0.56	0.69	0.96	1.04	1.36
Castilla y Leon	0.09	0.15	0.28	0.41	0.50	0.69	0.75	0.86
Catalonia	1.32	1.96	2.87	4.17	5.17	6.48	6.79	7.43
Extremadura	0.06	0.08	0.12	0.14	0.16	0.21	0.21	0.23
Galicia	0.12	0.18	0.26	0.33	0.36	0.48	0.47	0.52
La Rioja	0.03	0.06	0.12	0.17	0.21	0.27	0.30	0.34
Madrid	1.35	2.63	3.67	4.85	5.52	6.77	6.43	7.13
Murcia	0.22	0.48	0.74	1.05	1.19	1.46	1.50	1.70
Navarra	0.07	0.17	0.27	0.35	0.39	0.43	0.43	0.45
Valencia	0.44	0.78	1.44	2.14	2.63	3.38	3.56	4.06
Ceuta and Melilla	0.07	0.10	0.09	0.09	0.09	0.04	0.05	0.07
<b>Total</b>	<b>0.91</b>	<b>1.52</b>	<b>2.30</b>	<b>3.16</b>	<b>3.72</b>	<b>4.50</b>	<b>4.83</b>	<b>5.18</b>

Source: based on data from Otero *et al.*, 2010.

Resources made available to autonomous communities and municipalities by the central government to aid the integration of immigrants through the Support Fund for the Reception and Integration of Immigrants and their Educational Support have clearly not been sufficient to halt the potential deterioration of social services resulting from the rapid increase in demand due to population growth. Faced with this situation, the communities that have experienced significant migration flows have tried to use population growth as a central argument for redefining their financial relationship with the central government, with the aim of having their particular circumstances recognized and therefore, increasing their financial resources.

In this context, it has been more at the municipal level rather than the level of autonomous community where policy initiatives aimed at limiting the social rights of immigrants have emerged. Plans to restrict undocumented immigrants from registering as residents in local municipalities proposed by local councils in Vic and Torrejón triggered heated debate on the relationship between immigration and the saturation of public services and their financing. In fact, these initiatives were not a direct response to the difficulty in financing social services, which do not depend on municipalities but on the autonomous community governments, but rather were a response to the efforts of certain ‘political entrepreneurs’ hoping to use citizens’ perceptions of competition over scarce resources for their own political gain.

TABLE 6.2

**Percentage of educational expenditures dedicated to the immigrant population by autonomous communities**

	2000	2001	2002	2003	2004	2005	2006	2007
Andalusia	0.51	0.71	1.00	1.40	1.95	2.30	2.67	3.98
Aragon	0.62	1.12	2.13	3.56	4.59	5.39	6.46	6.97
Asturias	0.28	0.44	0.78	1.26	1.66	1.97	2.27	2.56
Balearic Islands	1.26	1.88	3.19	4.96	6.59	7.16	7.67	11.23
Basque Country	0.44	0.67	1.04	1.54	2.06	2.60	3.05	3.12
Canary Islands	1.19	1.58	2.31	3.16	3.74	4.30	4.33	7.34
Cantabria	0.39	0.57	0.97	1.70	2.43	2.87	3.39	3.48
Castilla-La Mancha	1.05	1.05	1.81	2.97	3.96	4.79	5.70	6.06
Castilla y Leon	0.40	0.70	0.98	1.64	2.17	2.81	3.24	4.26
Catalonia	1.42	1.91	2.78	4.02	5.68	6.59	7.72	8.39
Extremadura	0.41	0.56	0.81	1.06	1.28	1.46	1.73	2.09
Galicia	0.21	0.32	0.54	0.87	1.15	1.32	1.62	2.29
La Rioja	0.80	1.56	2.81	4.80	6.37	7.35	8.54	8.87
Madrid	2.28	3.02	4.43	6.22	7.69	7.90	8.50	8.75
Murcia	1.44	1.54	2.82	4.59	5.96	6.64	7.62	8.58
Navarra	1.14	1.72	3.33	5.04	6.19	7.00	7.36	7.35
Valencia	0.55	1.20	2.12	3.38	4.72	5.45	6.16	8.01
<b>Total</b>	<b>0.94</b>	<b>1.33</b>	<b>2.06</b>	<b>3.07</b>	<b>4.07</b>	<b>4.63</b>	<b>5.24</b>	<b>6.19</b>

Source: based on data from Otero *et al.*, 2010.

It is clear that immigration changes the patterns of distribution of national wealth; its impact is different depending on one's place in the socioeconomic structure. Thus, the decrease in costs of certain goods and services and the increase in real estate income or business profits that may result from the arrival of immigrants (especially through their integration in different markets: labour, housing, etc.) are particularly beneficial for the more affluent classes, while groups at the bottom of the social structure may face growing competition for employment and greater difficulty in access to scarce resources (services, public facilities, housing, etc.).

The precarious economic situation of many immigrants, along with discrimination in the housing market — principally rental (difficulties in finding housing in habitable conditions for an affordable price) — on occasion leads to the appearance of areas of substandard housing, crowding, exploitation and in general, the continued use of housing stock that is often close to the end of its useful life, permitting property owners to continue obtaining income from this substandard stock (Martínez Veiga, 1999). The phenomena resulting from the concentration of immigrants in disadvantaged neighbourhoods are multiple and their effects persistent over time; thus, we increasingly see those sectors of the native population who can, fleeing these neighbourhoods to escape the immigrant “ghetto”, aggravating the process of segregation.

The strong trend toward residential segregation, as well as the appearance of an increasing number of neighbourhoods in which the immigrant population has come to represent a significant proportion of the population in a short time, magnify the perception of competition over social resources, one of the clearest indicators of the differentiated impact that immigration has on different social classes.

## **6.2. Immigration and the social sustainability of the welfare regime**

There has been much debate in international studies on the extent to which immigration is a threat to the social legitimacy of the welfare state. Some authors argue that immigration is an intrinsic problem for the social viability of the welfare state (Freeman, 1986). Nationalistic and protectionist, the welfare state can only be sustained by a strong sense of belonging to a closed community whose membership is based on relationships of solidarity and support for redistribution (Myrdal, 1960). In fact, welfare states in different

countries have developed in close relationship with the institutionalization of specific citizenship regimes. Immigration, which in contrast, follows the open logic of the market and international demand for labour, alters the social basis of solidarity, thus, calling into question the welfare state itself.

This argument can be broken down into two areas of tension: tension between heterogeneity and redistribution and tension between recognition and redistribution (Banting, 2000). The former refers to the danger that an increase in ethnic diversity poses for gaining public support for welfare policies (Miller, 1995; Alesina and La Ferrara, 2005). According to this argument, ethnic diversity weakens the welfare state because it is difficult to generate trust and solidarity among individuals of different ethnic or cultural groups. If there is less of a sense of belonging to a national community in ethnically diverse societies, it is difficult for the population to believe in solidarity between citizens. As a result, there will be less support for the welfare state and redistributive policies. This hypothesis is supported by the historical evidence that shows that welfare states offering broad social rights have developed in ethnically homogenous countries characterized by the existence of strong trade unions, whereas more limited welfare states have emerged in contexts characterized by ethnic fragmentation.

The second source of tension appears between multicultural policies and welfare policies. Public support for redistribution is weakened by the establishment of multicultural policies based on the recognition of cultural or ethnic identities and the granting of rights to disadvantaged minorities. Defenders of this thesis argue that the establishment of multicultural policies has three negative effects on welfare policy: 1) it diverts time, energy and money from redistribution toward multicultural policies; 2) it erodes solidarity between citizens and therefore, support for redistributive policies, and 3) it produces a mistaken diagnosis of the problems minorities face (Barry, 2001; Wolfe and Klausen, 1997).

The tension between principles of individual freedom and group rights is common throughout the history of liberal political theory: there are two types of liberalism, one based on individual rights (Rawls, 1971) and the other which recognizes collective rights (Young, 1990). Proponents of the latter understand that disadvantaged ethnic or cultural minorities cannot achieve equality merely through the exercise of their individual rights, either because they have specific cultural needs or because they suffer systematic discrimination. As a result,



there is a specific type of inequality which cannot be dealt with using the generic tool of universal individual rights. Proponents of the former argue that giving special attention to certain groups can undermine universalism (Wolfe and Klausen, 1997). By using measures of positive discrimination for groups suffering from certain inequalities, others may feel they are being discriminated against. This permits extreme right parties to co-opt the anti-immigrant feelings of broad sectors of the autochthonous population (Freeman, 1986).

The hypothesis of the decline of solidarity has been challenged both in its initial version – as an effect of cultural diversity (Boeri *et al.*, 2002; Van Oorschot and Uunk, 2007) – and in its second version – as an effect of multicultural policies (Banting and Kymlicka, 2004). The results of empirical studies reveal, however, conflicting conclusions. In their comparison of OECD countries with or without multicultural policies, Banting and Kymlicka (2004) did not find evidence that multicultural policies tended to erode the welfare state. In fact, countries with the most solid multicultural policies had the most solid welfare schemes. In contrast, a study by the same authors on Canada regarding levels of trust among residents of different neighbourhoods found, in line with the findings of Putnam (2004) for the United States, that levels of citizen trust declined in proportion to the increase in ethnic diversity in the neighbourhoods they studied (Banting and Kymlicka, 2004).

Regardless, the outcome of the debate between proponents and opponents of the negative effects of immigration on the welfare state is not conclusive. Nevertheless, analysis of the attitudes of the autochthonous population should be framed within this debate. Confirmation of the first tension means that countries with greater immigration flows would have less favourable attitudes toward immigrants and would be less supportive of the welfare state. The second tension implies that the welfare state would face a greater risk of cutbacks in countries with multicultural policies. Given that Spain has had an extraordinary increase in its immigrant population since 2000, one would expect, according to the first hypothesis, a proportional increase in negative attitudes toward immigration. In addition, although Spain is not characterized by multicultural policies, it does have social assistance schemes based on the principle of need, the results of which are that certain immigrant groups are more likely to receive assistance due to their more precarious situation. The perception of overrepresentation of immigrants among beneficiaries of

assistance and subsidies can be understood as a form of *positive discrimination* and can lead to distrust among the autochthonous population.

In the following section, we will analyze the opinions and attitudes of Spaniards toward the presence of immigrants in Spain using data from the 2002, 2004, 2006 and 2008 waves of the European Social Survey (ESS). This data, based on a standard questionnaire developed for all of Europe, allows us to observe not only the evolution of attitudes over these years, but also to analyze them in relation to other European countries. However, the data produced from these surveys must be treated with caution because of the simplification and rigidity of possible responses restricting the opinions expressed by the participants and because of normative principles sanctioning xenophobic attitudes, which lead participants to provide socially acceptable responses (Colectivo Ioé, 2005; Cea D'Ancona, 2004). As a result, we will compare the data from the European Social Survey with the results from other surveys and qualitative studies carried out recently in Spain in order to provide greater nuance and even question the results of the ESS.

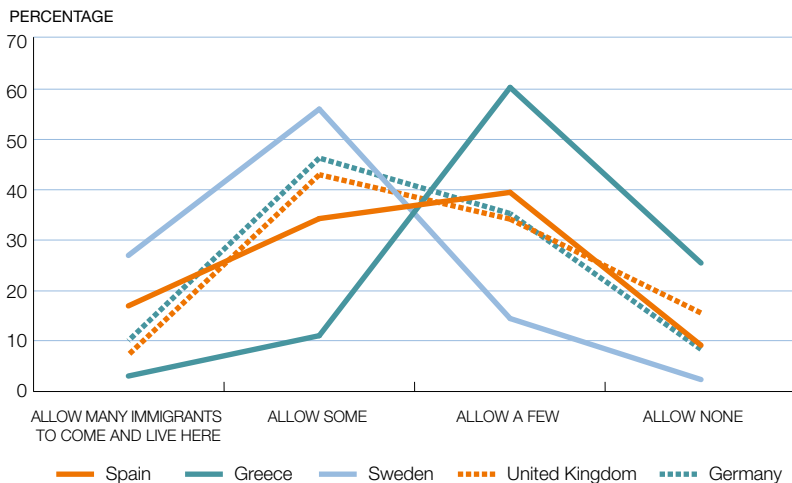
### 6.2.1. Tolerance towards Immigrants in Spain

The data from the ESS between 2002 and 2008 show that in general, attitudes toward immigration in the Mediterranean countries (Spain, Portugal and Greece) are less positive than in the countries of central and northern Europe. This is especially reflected in three questions asking respondents about their attitudes toward allowing immigrants to come and live in their country: 'To what extent do you think [country] should allow people of the same race or ethnic group as most [country] people to come and live here? How about people of a different race or ethnic group from most [country] people? How about people from the poorer countries outside Europe?' The majority of the Spanish population said that they would prefer to allow the entrance of only a *few* immigrants of a race or ethnic group different from their own; while in northern and central European countries the preference for allowing the entrance of *some* immigrants predominates. Graph 6.5 clearly reflects this differentiated pattern; the peaks on the left represent the countries of central and northern Europe and the peaks on the right represent the Mediterranean countries. Greece and Sweden appear as the prototypical countries for each profile. The higher relative levels and rapid pace of immigration in Southern European countries in recent years could be

associated with the majority attitude in these countries of greater reticence toward immigration; however, the case of Italy, which with similar migratory flows presents an attitude more in consonance with Northern European countries, contradicts this explanation. In addition, if we consider the proportion of extreme responses to the same question, we find that Spain stands out in comparison to the whole of Europe by the lower proportion of opinions most strongly against immigration. In this survey we can see that in 2002, Spain presented a significant level of responses in favour of ‘allowing many immigrants of a different race or ethnic group to enter the country’, behind only Sweden and Italy. There were also fewer Spanish who chose the response “do not allow any immigrants to enter”; in this case Spain was behind only Sweden and Germany. In this regard, although the majority of the Spanish population is more reticent toward immigration than that of the north of Europe, Spain has a smaller group holding xenophobic opinions and a larger group with more favourable opinions toward immigration than other European countries.

GRAPH 6.5

### Degree of acceptance of the presence of immigrants of other races or ethnicity\* in selected European countries



\*Response to a question regarding whether people of a different race or ethnic group should be allowed to come and live in the country of the respondents.  
Source: Based on data from the ESS 2002.

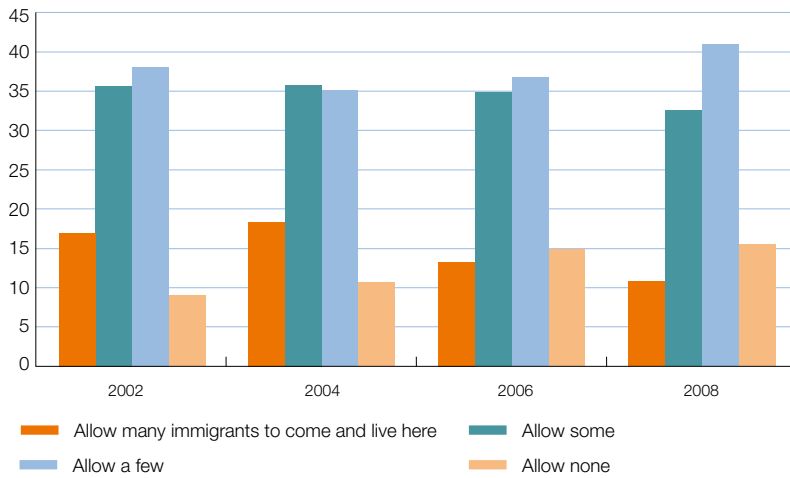
The trends shown in the data from the ESS reflect, however, a general increase in anti-immigrant attitudes in all the countries surveyed. In Spain we can also see a gradual decline in the levels of tolerance (graph 6.6). The trend is toward an increase in those who do not want to allow the entry of any immigrants of an ethnic group different from their own: this response increased from 9% in 2002 to 15.5% in 2008. This gives Spain a high level of xenophobic responses, similar to the UK (14.5%), although still below the 25.2% found in Portugal and the 29% in Greece for the same year. At the same time, there has been a decrease in the number of those who would allow the entry of many immigrants: from 17% in 2002 to 10.8% in 2008.

These trends are even more apparent if we combine response categories. In 2002, the majority of Spanish surveyed had a positive opinion about the presence of immigrants in Spain. In addition, a majority were in favour of the entry of ('many' or 'some') immigrants, whether they were of similar racial or ethnic characteristics (55.5%) or not (52.7%). In 2008, the attitudes of the Spanish, as reflected in the ESS, were much more negative toward immigration: the majority favouring restricting the entry of immigrants whether of the same racial or ethnic group (57.8%) or not (56.6%). The question, 'do immigrants make the country a better or worse place to live' also gathered a relatively negative response (graph 6.7), 38.1% responding that immigration makes Spain worse, in comparison to 33.3% who said that the country improves with the arrival of immigrants. We can also see that between 2002 and 2008 the percentages in the intermediate positions declined, which indicates a certain polarization of attitudes toward immigration, the curve tending to flatten while the extremes increase.

Despite this increase in intolerance, other questions indicate that the Spanish maintain a relatively positive assessment of immigration. This is the case for questions regarding the consequences of immigration for Spain, in which we see more positive opinions which remain steady over time. Thus, in 2008, 43.1% of the surveyed were of the opinion that immigration had positive effects on the Spanish economy, which did not vary significantly from 2002 (44.1%), and 53.2% thought that immigration enriched the cultural life of the country.

GRAPH 6.6

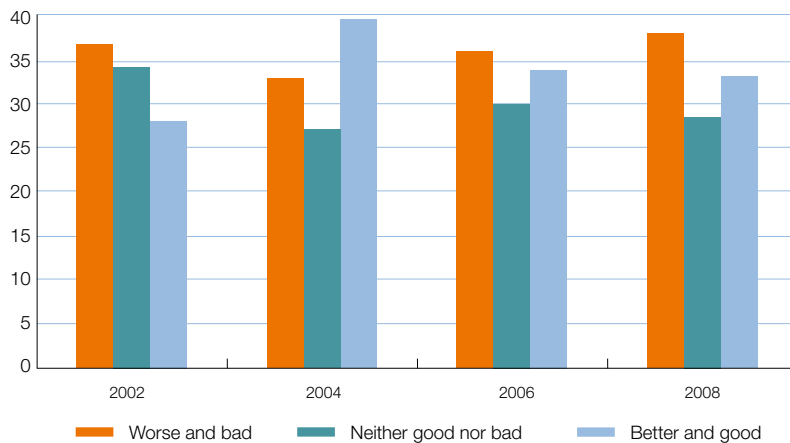
### Changing attitudes toward the presence of immigrants of other races and ethnicity in Spain 2002-2008 (percentage)



Source: based on data from the ESS (2002, 2004, 2006, 2008).

GRAPH 6.7

### Changing opinions regarding the effects of immigration on the receiving society 2002-2008 (percentage)



Response to the question: 'Is [country] made a worse or a better place to live by people coming to live here from other countries?'

Source: based on data from the ESS (2002, 2004, 2006, 2008).

Apparently, this positive assessment of the effects of immigration contradicts the increase in negative attitudes toward the entry of immigrants. In particular, the increase of respondents that say that ‘immigrants make the country a worse place to live’ – therefore thinking that immigration has negative effects on the receiving country — conflicts with the stable majority that thinks that immigrants make a positive contribution to the economy and cultural life of the receiving country. However, if we understand the question ‘do immigrants make the country a better or worse place to live?’ as an interpretation of those surveyed on the prevailing environment in the society and not so much as a general indicator of the individual attitude of the surveyed, the apparent paradox is resolved. Perceptions about the prevailing environment and the contribution of immigrants do not have to coincide; the same respondent can recognize the objective advantages that immigration brings to the country while also holding a negative assessment of the result, informed either by subjective elements or by the belief that immigration will result in disadvantages for him or herself in particular. This would explain the apparent contradiction between responses that reveal, on the one hand, a vision of Spain as worse off, and on the other, recognize the positive contribution that immigration makes to the economy and the culture. The image produced by the European Social Survey broadly coincides with that which emerges from other studies carried out in Spain. These studies have concluded that the Spanish population has a more positive image of immigration than the average for European countries (Anduiza, 2005; Martínez-Herrera and Moualhi, 2005).

These studies also reveal a gradual increase in xenophobic attitudes in Spain (Cea D’Ancona, 2004, 2005, 2007; Cea D’Ancona and Vallés, 2008.2 2009) and an attachment to cultural uniformity (Ayerdi and Diaz de Rada, 2008). The evolution in attitudes captured by public opinion barometers by the CIS reveals a growing concern about immigration in Spain; in 2006 immigration became the issue which most concerned the Spanish, mentioned by some 59% of respondents. In addition, in November 2005, the CIS barometer indicated that 60% of the Spanish thought that there were too many foreigners living in Spain, while one third (33%) thought that there were a lot of foreigners but not too many. However, as Méndez also points out, we should not exaggerate the importance of the presence of immigration on the list of problems most cited by the Spanish. The increase in concern about immigration coincides with the

presence of this issue in the media and in public debate (Méndez, 2008). Thus, moments of greater concern about immigration are produced after periods of intense television and press coverage, but concern then falls back to earlier levels. The consolidation of immigration as one of the issues of greatest concern to the Spanish began in 2004.

Concern over immigration does not in itself indicate xenophobia, as it can refer to both anti-immigrant attitudes as well as concern about the difficult living conditions of the immigrant population. As a result, although there are some differences depending on the respondents' ideological position — with a certain predominance of the centre-right and the right — we cannot say that these differences are very great.<sup>(38)</sup> In contrast, concern over the issue of immigration is correlated with the percentage of immigrants in autonomous communities (the correlation index for 2005 was 0.4) and the age and education level of respondents (Méndez, 2008: 10-12).

The increase in intolerance appears to be more clearly measured by other questions on the CIS barometer. Cea D'Ancona argues that the barometer has lost its effectiveness as an indicator of xenophobia, given that since 2002 there has hardly been any variation in the majority response regarding the acceptance of 'permitting the entry of only those that have work contracts' (eight of every ten surveyed in agreement in 2007). The author proposes, in contrast, the usefulness of the question "Are the laws too lenient?" to discern different attitudes regarding immigration. In fact, this question became an indirect indicator of xenophobia between 1996 and 2008.

This question from the CIS barometers reflects above all an increase in public support for more restrictive policies. A broad and growing sector supports the idea that Spain's immigration policies are too lenient. In 2008, 42% of those surveyed for the barometer held this opinion, an increase of 18 points from the 2004 barometer (24%). These surveys also record an increase in support for the expulsion of unemployed immigrants (14% were strongly in support of this in 2008, in comparison with 7% in 2005) and for sending immigrants back to their countries of origin if they are undocumented (16% in 2008, four points more than in 2007 – CIS

(38) On the other hand, there is a clear relationship between ideological position and the perception of the number of foreigners residing in Spain: the more to the right, the greater is the percentage of survey respondents that are of the opinion there are too many immigrants (Méndez, 2008).

barometer, November 2005; CIS-OBERAXE survey, 2008). In addition, a qualitative study based on focus groups revealed unanimous agreement on the need to increase immigration control (González-Enríquez and Álvarez Miranda, 2005).

Despite these general trends, the opinions and attitudes toward immigration reveal significant differences. The studies include three primary factors that structure individual opinion: cultural capital, ideological position and social class (Ayerdi and Díaz de Rada, 2008; Méndez, 2008; Cea D’Ancona and Vallés, 2009). Ayerdi and Díaz de Rada detected the closest association between education level and attitudes toward immigration. Individuals with lower levels of education reveal the highest level of “rejection” of immigration, probably because they are more concerned about its possible material repercussions.

### **6.2.2. Opinions regarding immigrants’ ‘monopolization’ of public services**

The data presented in chapter 3 show that immigrants use welfare state subsidies and services to a lesser extent than do Spanish nationals. However, the majority of the Spanish believe the opposite. Given that opinions regarding the ‘monopolization’ of public assistance were not recorded in the ESS, in this section we will refer to other studies, including both surveys and qualitative research (Cea D’Ancona, 2004, 2005 and 2007). Regarding surveys recently published in Spain, three studies have included questions on immigrants’ use of public services: IESA (2006), CIS-OBERAXE (2007) and CIS-OBERAXE (2008). Regarding quantitative studies we will refer in particular to the MEXEE project (Cea D’Ancona and Vallés, 2008a and b) and the *Informe sobre el racismo y la xenofobia en España del año 2009* [2009 Report on Racism and Xenophobia in Spain] (Cea D’Ancona and Vallés, 2009), which is a synthesis of and comparison of all the above.

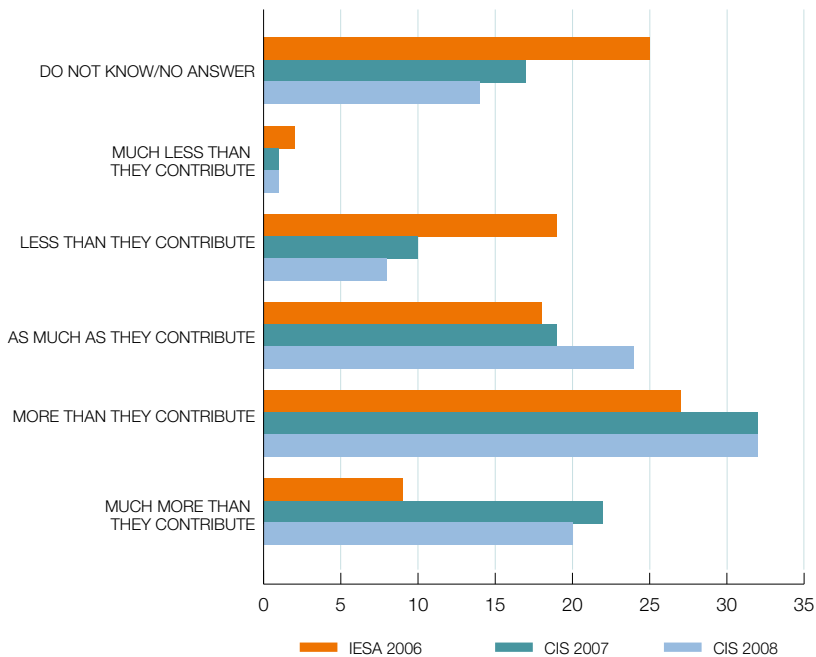
According to the three surveys cited, a majority of the autochthonous population has an image of the immigrant as a ‘usurper’ of public resources. The data shows that a majority of the population perceives immigrants as receiving ‘more’ or ‘a lot more’ than they contribute. The sum of both these responses was 54% in 2007 and 52% in 2008 (graph 6.8). This is similar to what is found in other European countries, with welfare benefits being associated with ethnic minorities and the



welfare state being seen as ‘something for “them” paid for by “us”’(Freeman, 1986: 62). In addition, the CIS-OBERAXE survey (2008) showed that immigrants are perceived as the group that is most protected by the state, with 40% of the surveyed agreeing that they receive ‘enough’ assistance, far ahead of the groups that are the traditional beneficiaries of public aid (graph 6.9).

GRAPH 6.8

**Opinions regarding what immigrants receive from the state (percentage)**



Source: Cea D’Ancona and Vallés (2009: 26).

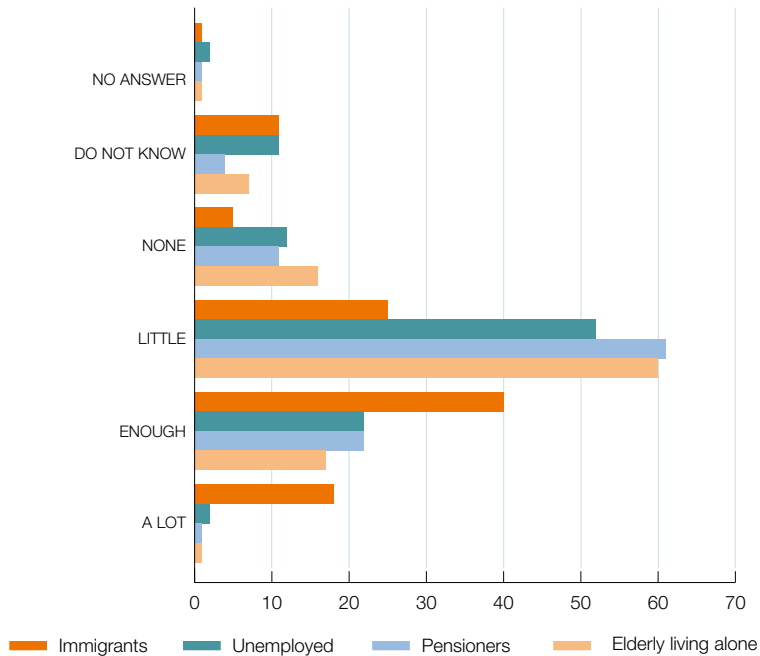
In this same survey, 50% of participants were of the opinion that immigrants receive more education-related assistance (financial aid for books and meals) than the Spanish, even when income levels are similar, and 46% were of the same opinion regarding healthcare (CIS, 2008). Consistent with these opinions, earlier surveys reveal that (CIS 2007, IESA 2005, IESA 2006) the discourse in favour of giving Spanish nationals preference regarding social benefits is much more widespread in regards to education than healthcare. Seventy-eight per cent

of those surveyed in the IESA 2006 survey think that Spanish parents should be given preference for school choice. The fact that there are fewer respondents who think that immigrants use more resources in healthcare than in education may mean that the respondents' direct experiences with the healthcare system have contributed to breaking down these false perceptions. As a result, the opinion that immigrants monopolize educational benefits will be more dominant because only a part of those surveyed have school-age children and therefore, direct contact with the educational sphere.

GRAPH 6.9

### Opinions regarding the social protection that different groups receive from the state

Percentage



\* Response to the statement: 'I am going to read the names of a series of groups and I would like you to tell me, for each group, if you believe that they are currently receiving a lot, enough, little or no protection from the state'. Source: D'Ancona and Vallés, 2009 and 2008 CIS-OBERAXE survey.

In contrast to the above surveys, focus groups in the MEXEE study reveal that the national preference discourse is used more often in relation to healthcare

services than education, which is an argument for the idea that ‘the autochthonous population perceives itself as being discriminated against’ (Cea D’Ancona and Vallés, 2009: 146). These results contradict the thesis that contact between the autochthonous and immigrant population is important in reducing prejudice, and in contrast, they reinforce the opposite hypothesis of conflict, which will be explained next.

A majority of those surveyed also agree that immigrants reduce the quality of social protection systems. Along with the idea that immigrants monopolize services and benefits, there is also the suspicion that they abuse or overuse the public services offered, contributing to their collapse. In the CIS-OBERAXE survey for September-October 2008, 52% strongly agreed or agreed with the statement that ‘the presence of immigrants decreases the quality of healthcare services’. Some 50% believe that ‘the quality of education is worse in schools where there are many children of immigrants’.

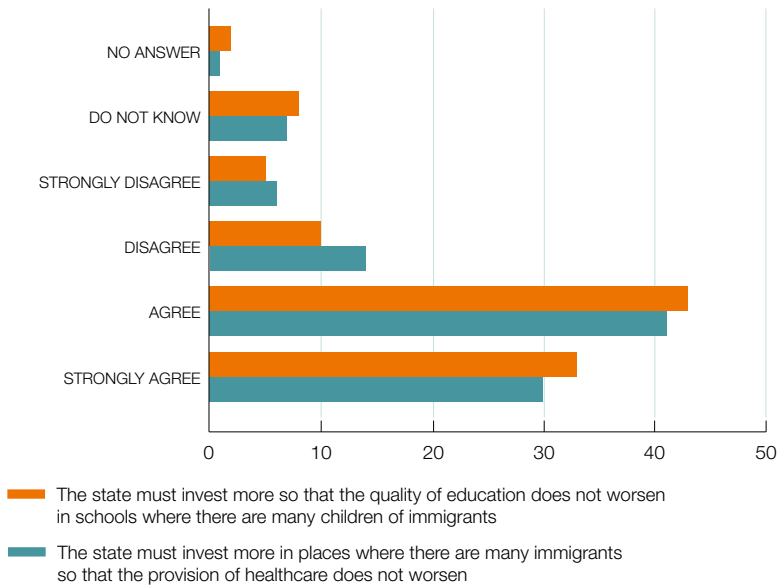
Paradoxically, despite immigration being associated with a decline in the quality of social benefits, those surveyed in the CIS (2007) and CIS-OBERAXE (2008) studies were less and less likely to agree with the statement that ‘the government should invest more in places where there are a lot of immigrants so that healthcare does not worsen’. Thus, the sum of the answers ‘strongly agree’ and ‘tend to agree’ declined from 79% in 2007 to 75% in 2008. This slight decline of four percentage points (and three points in the case of public education) is remarkable, as Cea D’Ancona and Vallés point out, given that in these questions ‘the easy and predictable answer would be to agree’ (Cea D’Ancona and Vallés, 2009: 282).

Studies on the issue explain these xenophobic attitudes as related to perceptions among some sectors of the autochthonous population of being in competition with or threatened by the immigrant population. Such a threat could be understood as competition over access to jobs and social services (education, healthcare and housing) or as cultural, religious or identitarian in nature. This fits with the classic theory most frequently invoked to explain attitudes toward immigrants, group conflict theory (Campbell, 1965), which argues that the perception of ‘zero sum’ competition between groups translates into the perception of a threat which feeds prejudices and negative stereotypes among the members of one group regarding the other. The

perception of threat is supported by qualitative studies in Spain, which indicate that a wide majority of those surveyed perceive the immigrant as a rival or competitor regarding access to benefits and public services (Cea D’Ancona 2009; Cea D’Ancona and Vallés, 2008b).

GRAPH 6.10

**Opinion of the Spanish population on increasing public spending so that the quality of social benefits does not worsen (percentage)**



Source: D’Ancona and Vallés, 2009 and 2008 CIS-OBERAXE survey.

As a consequence, the desire to grant rights to immigrants declines and opposition to any favourable treatment of immigrants increases (González-Enríquez y Álvarez Miranda, 2005). Measures of positive discrimination which favour immigrants are considered by a part of the autochthonous population to be discriminatory (Cea D’Ancona and Vallés, 2009). These studies verify the existence of a discourse in defence of giving priority to the autochthonous population over foreigners:

‘...[public services] that the autochthonous feel to be their own, not recognizing the legitimacy of the immigrant to enjoy them. “They just arrived”, “they didn’t contribute to paying for them, as our parents and grandparents did...” are the common arguments used to justify giving priority to the autochthonous over the foreigner’ (Cea D’Ancona and Vallés, 2009: 256).

Given that different classes live under different conditions, the perception of conflict varies based on social class. There is broad consensus that the perception of competition and that immigrants monopolize public resources is more widespread among individuals with lower levels of education and income (Ayerdi and Díaz de Rada, 2008). These authors suggest that since immigration is concentrated within sectors of the working class, both skilled and unskilled, it is in this sector where one would expect to find greater perceptions of competition between natives and immigrants. Spanish professionals and those in management, therefore, are less likely to have xenophobic attitudes. Cea D’Ancona and Vallés (2009) also conclude that education level has a significant impact on discourses regarding nationals having preference in access to benefits and services. Thus, there is a 35 percentage point difference between the majority favourable to this position among individuals with low education levels (75%) and those persons with intermediate or higher levels of education (40%).

The idea that immigration is a threat is based less on objective situations than on beliefs and perceptions (Méndez, 2008; Cea D’Ancona and Vallés, 2008b, 2009). This is reflected in the influence of variables that structure perceptions such as the social class, age, religiosity and ideology of those surveyed; intolerance is greater among those with a lower education and income, who are older, more religious and hold ideological positions on the right. Regarding this, Boeri *et al.* (2002) in a study on Italy concluded that anti-immigrant attitudes are more the result of racial intolerance than economic concerns.

### 6.3. Conclusions

In this chapter we have discussed the complexity of analyzing the economic impact of immigration on the host country given all of the factors that must be taken into consideration, as well as their interrelationships. Immigration has been one of the principal elements promoting economic growth in Spain in

recent years, although it is certainly possible to raise criticisms regarding the sustainability of the model of economic development followed in Spain in recent decades. However, in no way is it possible to hold immigrants responsible for the negative implications of this model, as they have only responded to the demand for unskilled labour from a broad range of economic sectors in Spanish society. Any transformation of the production model proposed for the future must take into account the supply of immigrant workers settled in Spain in recent years, the majority of whom have come to stay.

Overall, a clear consensus can be found among scholars regarding the positive impact of immigrants on the financing of social protection systems during the initial stages of immigrant settlement, due to their youth and therefore, their availability to enter the labour market. As the migratory process matures and the sociodemographic structures of immigrant groups converge with those of the autochthonous population, these positive effects will be moderated until they practically disappear. However, there is no empirical evidence that shows that immigrant populations will end up becoming a burden for the welfare states of receiving societies.

The data presented in chapter 3 contradict the arguments that immigrants abuse and overuse benefits and social services. Social perceptions, however, function to a great extent in an autonomous manner. Data show that a considerable percentage of the Spanish population is of the opinion that immigrants receive more from the welfare state than they contribute, and they are reluctant to concede social rights to these citizens. Some 50% of those interviewed for the 2008 CIS survey thought that immigrants receive more education-related assistance than the Spanish do, even when income levels are similar, and 46% shared the same opinion regarding healthcare (CIS, 2008).

A majority of the surveyed also supported establishing access mechanisms that would favour the autochthonous population: 78% of those consulted in 2006 agreed that Spanish parents should have preference when choosing a school (IESA, 2006). This indicates that politicians must be conscious that a part of the citizenry does not support (or even directly rejects) measures to integrate immigrants, particularly if these include measures of positive discrimination favourable to the immigrant population.

In the context of today's budgetary constraints and spending cuts, health authorities will have to pay special attention to the concentration of demand in certain points of the healthcare system (hospital emergency services, healthcare centres in areas with a high concentration of immigrants) in order to avoid the political manipulation of sectors of the autochthonous population who feel they are in competition with immigrants for scarce resources. In the area of personal social services, such arguments may be even stronger as the lack of definition within this sector and particularly, its traditional lack of resources fuel this perception of competition between Spanish nationals and immigrants.

However, it is in the educational sphere where the discourse of national preference appears more entrenched; thus, it can be a considerable obstacle for public policies aimed at promoting equal educational opportunities at the expense of reducing freedom of school choice. Many Spanish parents oppose measures in favour of a more even distribution of immigrant students among schools because they believe that their presence lowers the quality of the education their children receive.

In all of these policy areas, it is not enough to present the facts in order to overcome the perception that immigrants are a threat and in competition with the native-born population. Although the intensity of anti-immigrant sentiment appears to be associated with education level and how well-informed those surveyed are, it also stems from ideological and religious beliefs, which are much more resistant to change.

# VII. Conclusions: The challenges and opportunities immigration poses for the welfare state

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## 7.1. General conclusions

The opening of social protection programmes to immigrants by the Spanish welfare state has been relatively effective given its characteristics and limitations. However, the incorporation of immigrants into the welfare state, whether through contributory or direct assistance channels, has been limited in intensity and breadth. We can thus speak of a ‘subordinate construction of immigrants’ social rights’ (Carrasco y Rodríguez Cabrero, 2005). In the institutional framework of the Spanish welfare system, characterized by a dual form of income support (contributory/universal) which creates a polarization of its clientele (Ferrera, 1996), the opportunity for immigrants to benefit from the system are limited by the fact that so many of them are employed in unprotected sectors of the labour market. Generally immigrants who work and are affiliated with the social security system have temporary contracts entitling them to short periods of unemployment; while the immigrant population that works in the informal economy only has access to social assistance through municipalities and third sector organizations. Moreover, immigrant clientele face discrimination and ethnic exclusion in the use of benefits and services. A clear example of this is found in the dynamics of school segregation, which tend to concentrate immigrant children in public schools.

There is no doubt that the non-EU foreign population works and lives in more precarious conditions than the autochthonous population (with a higher incidence of participation in the informal economy, temporary contracts, etc) and are, therefore, more prone to suffer the risks of socioeconomic exclusion. Illustrating this is the way in which these groups have been hit much harder by the present economic crisis, their unemployment rate increasing to close to



30% in comparison to an unemployment rate of 18% among the autochthonous population. This would lead to the conclusion that their level of dependence on social protection systems must be quite high and therefore, the cost of such coverage considerably high as well. However, we have found that the immigrant population not only does not rely heavily on the different existing social protection programmes but in fact they are generally underrepresented among the beneficiaries of most social protection schemes in proportion to their relative weight in the population. In addition, available data show that the fiscal balance of immigration based on their contribution to public finances and the cost of benefits and social services they receive is clearly positive. This is largely explained by the younger age of the immigrant population, which therefore has less need for healthcare services, pensions, etc. In a certain sense, immigration has been ‘a stroke of luck’ for the social security system, as immigrants’ contributions have permitted the adoption of certain necessary reforms with greater margin for reflection and greater consensus; but this of course does not provide a definitive solution to the problem of the systems’ future financial sustainability.

The immigrant population has become a structural component of Spanish society. Since the beginning of the economic crisis that has affected the Spanish economy, with particular intensity since 2008, migratory flows have slowed down, but this does not mean they are going to disappear. Family reunification will continue, and the flow of economic immigrants will likely increase again when the economy begins to show signs of recovery. While some of the foreigners settled in Spain will decide to return to their country of origin or emigrate to other developed countries looking for better job opportunities, the majority of those now settled form an integral and structural part of the Spanish population.

The so-called “call effect” exists, but it is not a result of the existence of generous social programmes in the host country, but rather is associated above all with employment opportunities. The model of economic growth in place in Spain during recent decades, based on the development of labour intensive sectors with low productivity, required a large labour supply, and the arrival of immigrants from developing countries responded to this demand. Moreover, a deficit in the provision of care produced by the growing incorporation of women into the labour force, aggravated by a weak institutional response in the face of this change, generated a need for female workers in the domestic

sector that was largely complementary to the demand for male workers generated by sectors such as construction and agriculture.

The immigration of recent decades has permitted the reproduction of this model of growth, but at the same time it has created a “new social division and a new division of labour” (Carrasco and Rodriguez Cabrero, 2005) in which immigrants form a new Spanish proletariat. Immigrant labour has aided the transition of autochthonous workers toward jobs with better conditions and has facilitated the participation of women in the labour force.

Immigrant workers were incorporated into a pre-existing economic system and responded to a demand for labour generated by Spanish companies and families. We cannot attribute the low productivity of the Spanish economic system to immigration or accuse immigrants of having made it difficult to adopt the measures necessary to transform this model. It was not the existence of abundant labour supply that determined business strategies, but rather the demand for unskilled labour launched by economic actors (employers and families) that largely contributed to the generation of immigration. With their labour, immigrants have contributed to the survival (at least temporarily) of economic sectors that would otherwise have succumbed to international competition, in this way generating wealth and helping to maintain higher skilled and better paid jobs for autochthonous workers. At the same time, they have carried out their migration projects although under precarious conditions and on occasion open exploitation, and frequently have started their own businesses. The phenomenon of “ethnic entrepreneurship” should lead us to consider the consequences of immigration in terms of the importation of human capital, given that a considerable number of economic immigrants have qualifications and /or skills that are potentially useful for the Spanish economy.

From an academic perspective it is possible to raise a theoretical debate about the extent to which it would have been possible to develop a different model of economic growth, one based on autochthonous labour (increasing the economic activity rate, particularly that of women) and directed toward sectors that are capital-intensive, technology-intensive and/or knowledge-intensive, as well as toward the creation of a professionalized system of personal social services. What is certain, in any case, is that today those millions of foreign residents now living in Spain form part of the Spanish employment problem and will also have to be part of its solution.

In changing from an economic model of labour-intensive sectors of low added value to a knowledge economy of high-added value and greater competitiveness, the challenge will be to increase and improve the education and specialization of Spanish workers (autochthonous and immigrant) and to create jobs appropriate for their qualifications. The key to developing a more competitive growth pattern will be to reduce unemployment while also increasing the activity rate and productivity.

Cost-benefit analyses of immigration are extremely complex given the difficulty in considering all the variables involved. Despite this, all analysis on this issue suggests that the net economic effects of immigration on the receiving society are positive. Immigration contributes in diverse ways to economic development: favouring an increase in employment (through an increase in the active population and women's activity rate, decreasing rigidities in the labour market); improving per capita income (through the influence on activity and employment rates); contributing to state finances (through direct and indirect taxes, as well as contributions to social security); favouring increased consumption and encouraging the creation of new businesses.

Contrary to what has been argued on occasion (Reher and Sanchez, 2009), immigrants do not make their decisions about migrating based on the "generosity" of social services. There is no empirical evidence whatsoever suggesting a relationship between the volume of migration flows and the level of guaranteed social protection in a country. On the contrary, various studies have shown that immigrants look for monetary income, so they search for areas where they have the greatest possibility of finding work and not where there is a more generous social protection system (Amuedo-Dorantes and De la Rica, 2005; Garci Gomez and Lopez-Casanova, 2006).

## 7.2. Challenges for the future

In the near future, Spanish society will face a series of challenges stemming from the important migratory flows it has experienced in recent years. Transforming new residents into citizens with full rights so that they become an integral part of the society while maintaining their own culture is the complex goal to achieve. Spain is, in fact, in a similar juncture to that of other European countries that are currently trying to define or redefine their models

of incorporation to address a complex and changing social reality. The settlement of nearly six million new residents has not only meant an increase in the population but also an increase in cultural and ethnic heterogeneity. It implies an increase in demand for benefits and services but also the appearance of problems of adjustment between supply and demand in the area of welfare.

The intercultural approach of the Spanish central government in recent years aims to recognize the right to a distinct cultural identity, but also seeks to avoid practices which will separate communities. In this context, the different social protection programs must address a number of challenges which raise questions regarding the way they function as well as their future sustainability.

- Growing ethnic and cultural heterogeneity means that social protection systems must pay greater attention to inequalities. Improving data generation systems, as well as implementing mechanisms to respond to these inequalities should permit different welfare programmes to adapt to a population with diverse needs. Such adaptation should include the training of professionals to manage diversity, as well as the establishment of systems for linguistic and cultural mediation; in general these measures would need to be developed within a broader framework of initiatives to overcome inequality targeting the entire population.
- In the healthcare sphere, the first objective should be to eliminate barriers in access to the healthcare system (making it easier to obtain a health card, expanding hours during which appointments can be made, etc.), which currently prevent its de facto universalization. As we have seen in this study, immigrants are at present in better health than the autochthonous population, between 30% and 50% less likely to state that they have fair to poor health, suffer from a chronic illness or disability or face limitations in their daily activities due to health. In this regard, Latin Americans and East Europeans are in relatively better health than immigrants from Africa. The primary reason for this difference in subjective health lies in the younger age of these groups with respect to the autochthonous population. Once this ceases to be the case, their health will tend to be worse than that of the autochthonous population because of their poorer living conditions in Spain.

The healthcare system may contribute to the reduction of this difference through preventative care and public health measures that reduce the inequalities

in healthcare that affect these groups. Strengthening primary care would help to manage the peaks in demand for emergency healthcare services (which immigrants tend to use slightly more often than the autochthonous population); this would also help in managing demand in those primary care centres where there is a greater concentration of immigrants, resulting from residential segregation. In recent years the population has increased significantly in certain areas without healthcare resources keeping pace. This can lead to a deterioration of the healthcare provided, which has negative repercussions on the health of residents in these areas, as well as on social perceptions of the public healthcare system. Primary care is the most appropriate level for responding to inequalities in the use of the healthcare system by the immigrant population through initiatives promoting health and health education.

- Institutional and financial deficits in the personal social services system are a serious handicap when it comes to developing mechanisms to respond to the challenges posed by immigration. While this area of social services tends to respond more closely to the problems arising from the precarious conditions in which some immigrant groups live, the scarcity of budgetary resources for most of these programs leads to restrictive practices in granting these benefits and services.

As we saw in chapter 2, Spain spends less than 50% of the European average on these types of programmes and approximately 30% of what is spent by France or Sweden. In addition to real demand not being covered, the lack of funding for this area of social policy leads to the proliferation of stereotypical discourses claiming that the autochthonous population is ‘excluded’ from certain programmes (low-cost or free school lunches, public day-care centres, etc.), or that immigrants receive ‘preferential treatment’ from public authorities. Differences in these types of programmes among municipalities and autonomous communities also produce significant disparities depending on place of residence, which affect the disadvantaged, both immigrant and autochthonous.

- It is urgent to rethink education policy in relation to the perpetuation of social inequalities. In Spain, students of immigrant origin obtain poorer academic results than do autochthonous students (a 60 point difference on reading comprehension on the PISA 2009 tests); they are 2.1 times more likely to leave school early than their autochthonous classmates and are less

likely to continue in post-compulsory education (only 10% of immigrant students undertake post-compulsory studies). A low level of education reduces opportunities for insertion in the labour market, even more so for young people of different cultural and ethnic background. Although the poorer academic performance of immigrant students is a complex problem involving multiple factors, research in this regard is in agreement that school segregation is a key element. School segregation is worrying because it is an important determinant of educational opportunities for immigrant students. PISA results for Spain show that although average student results in private schools are 38 points higher than in public schools, the difference lies in the social composition of the student body, as the quality of education in both private and public schools is comparable. Students' access to schools is mediated by selection dynamics involving both parents and schools. Curbing segregation, therefore, requires regulating both autochthonous parents' freedom to choose schools as well as school admission policies. This is a controversial task which faces the explicit opposition of those who advocate educational freedom over the goals of equality and equity.

- Recognizing the role of immigrant women in the caregiving field is the first step toward improving the working and living conditions of this large group. As we have seen, women immigrants make up 81.3% of domestic caregivers for the elderly (Imsero, 2004), as autochthonous women avoid these jobs because of their low pay and difficult working conditions. As the majority of these jobs are live-in jobs, they have become an occupational niche for the most recent arrivals and for women immigrants from nationalities that are less integrated, not yet having been able to regularize their status. The consolidation of a system for the provision of care based on insecurity and informality has so far prevented the emergence of a labour market for professionalized care under decent working conditions. This sphere is potentially an important source of employment for a large number of workers in Spain, both immigrants and native-born. Increasing female labour force participation to European parameters will happen largely by overcoming this state of affairs. Both the reform of the domestic social security regime (by making the working conditions of those in this regime comparable to the working conditions of other workers) and the expansion of the programmes linked to development and implementation

of the ‘Dependency Law’ (*Ley de Promoción de la Autonomía Personal y de Protección de las Personas en Situación de Dependencia*) present a golden opportunity to move in that direction. Unfortunately, the budgetary constraints that threaten to seriously affect the implementation of such reforms complicate this scenario.

- Although the possibilities for government intervention in this area are relatively limited, the consequences of the concentration of immigrants in certain neighbourhoods should be considered. As is well-known, the immigrant population is not distributed homogeneously throughout the country but is rather concentrated in certain regions, which contributes to the increase in demand for welfare benefits and services in these areas. The development or reinforcement of territorial stigmatization (associating negative behaviours and attitudes with residing in certain neighbourhoods) is a phenomenon that particularly affects immigrants, clearly limiting the opportunities (particularly employment opportunities) of the residents in these areas. This process, which is still in its infancy in Spain, has been studied extensively in societies with a longer history of migration; once crystallized it has required vigorous government action to address it.
- As has been noted, the settlement of immigrant populations has drawn attention to problems in the balance of powers and responsibilities between different levels of government. One of the clearest examples of this is the imbalance in financial flows produced by the unequal division between the costs (who pays for benefits and services provided to new residents) and benefits of immigration (the mechanisms to collect and manage the financial resources generated by the presence of new contributors). The low level of funding from the Support Fund for the Reception and Integration of Immigrants and their Educational Support (Fondo de Apoyo para la Acogida, Integración y Refuerzo Educativo de los Inmigrantes) — 200 million Euros annually since its consolidation to be distributed among autonomous communities and municipalities — as well as the relatively rigid processes of negotiation over autonomous and municipal financing cannot adequately resolve a problem that could have far-reaching negative consequences both in terms of a deterioration in public services (in areas where demand has risen without a corresponding increase in funding) and a resulting politicization of this deterioration.

- The danger of the ‘displacement’ of the most disadvantaged among the autochthonous population as a consequence of the arrival of new residents in even more precarious situations, as well as the flight of the middle class from public social protection systems (which come to be labelled as services for the poor) are two sides of the same coin related to shortages in human, material and ultimately financial resources for social protection programmes. If the authorities responsible for social protection systems do not respond flexibly to the increase in demand for services and benefits linked to the settlement of immigrants, this could result in growing alienation among the middle class (accelerating the previously existing process of opting for the market as the main service provider) as well as increasing anti-immigrant sentiment among those who must continue to rely on public social protection schemes. The consequences of both are the politicization of immigration and the loss of legitimacy of the welfare state, threatening its sustainability in the medium and long-term.
- The speed with which Spanish society has become a net receiver of migration flows, along with the absence of an organized and electorally successful extreme rightwing, has thus far resulted in the issue of immigration having a relatively low profile in the Spanish political agenda. This does not mean that the risk of the politicization of immigration through the mobilization and/or generation of anti-immigrant sentiment cannot occur in Spain. In most of the countries with a long history as recipients of migration flows, this issue has emerged (with greater or lesser virulence) on the political scene as part of a political strategy or for electoral gain. In terms of European politics, in recent years we have seen a rise in extremist rightwing parties with anti-immigrant discourses and mainstream conservative parties mobilizing xenophobia to strengthen their electoral base. At the same time, social democratic and liberal parties have responded cautiously to problems related to immigration for fear of being judged too lenient or generous toward immigrants, and leftwing parties have had to contend with a loss of a portion of their traditional electorate due to hostility toward immigration. These processes have contributed to influencing immigration policies adopted in much of Europe. In Spain the politicization of immigration has emerged primarily on the municipal level, with enrolment in municipal population registers (the main gateway to universalized social rights) as the main battleground.



- As we have also seen, the increase in cultural diversity brought about by immigration is causing a decline in favourable attitudes toward social solidarity and redistribution. A majority of the population believes that immigrants receive ‘more’ or ‘a lot more’ from the state than they contribute (the combined responses added up to 52% in 2008). In particular, 50% of those surveyed believed that immigrants receive more education-related aid than Spanish citizens, even if they have a similar income level, and 46% shared the same opinion regarding healthcare benefits.

The autochthonous population might be reluctant to contribute with their taxes to redistributive schemes they think largely favour the immigrant population (regardless of the fact that this is far from the reality). In some European countries, such as the UK or the Netherlands, immigration has indirectly contributed to a reassessment of the effectiveness and axiological foundation of social policies. As we have been stating, the loss of social support for the welfare state calls into question the foundations on which its future prospects must be sustained.

- The existence of non-discriminatory mechanisms for social mobility that guarantee real equal opportunity for all (regardless of their social, cultural, ethnic or religious origin) is one element for the successful incorporation of immigrants in democratic societies. The widespread existence of prejudices and racist and xenophobic behaviour (albeit not always explicit) forms part of the explanation for the problems of alienation experienced by young ‘second generation’ immigrants in diverse European countries in recent decades. Designing viable models for integration into the receiving society for these young people requires guaranteeing the possibility of upward social mobility for immigrants’ descendants as well as designing and implementing effective policies to fight discrimination (indirect as well as direct). In this regard, European societies face an extremely complex challenge for the future, and Spanish society is no exception, as the attitude of the Spanish population toward immigrants has become more negative in recent years. The area of social protection policies, with a central role in this process, must adjust its guidelines for action, taking into account the diversity stemming from the settlement of immigrants around two basic axes: equality (equal access to benefits and services) and equity (attainment of equality in outcomes, although this may mean differential treatment).

Throughout this study our aim has been to describe how immigration positions us to address structural problems in the Spanish welfare regime, revealing its weaknesses in the form of pressures being placed on the system, imbalances in resources and the inability to meet certain demands. But it has also revealed the strength of the system in its capacity to include newcomers while maintaining service coverage. The arrival of populations of immigrant origin is thus not only a challenge but also an opportunity to identify weaknesses in our social protection system and develop policies to address them, respond to new challenges and guarantee a sustainable future for the welfare state.

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The present study addresses the complex relationship between immigration and the welfare state in Spain. The number of immigrants in Spain has greatly increased in recent years, reaching levels similar to those found in the most developed countries in the European Union. Spain's transformation into a host country for immigrants took place in times of vigorous economic growth and employment, a period of economic boom to which immigrants contributed decisively. The collapse of this long phase of growth has made immigration much more visible, and in particular, has sharpened debate on the impact of immigration on Spain's social protection system.

This book aims to provide authoritative information on immigrants' access to and use of welfare state benefits and services, but also on their contribution to financing the welfare state. With this data, the authors analyze the implications of immigration on the economic and social sustainability of the welfare state in Spain, underscoring the role that the immigrant population has played in bringing to light the strengths and weaknesses of the social protection system.



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