

Oliveira Roca, Maria Nazaré

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40TH CONFERENCE OF THE EUROPEAN REGIONAL SCIENCE ASSOCIATION

Barcelona, 29 August – 1 September 2000

**DEVELOPMENT ACTORS IN MULTIFUNCTIONAL RURAL SPACES IN
PORTUGAL**

Maria de Nazaré Oliveira Roca

Centro de Estudos de Geografia e Planeamento Regional da Universidade Nova de Lisboa,
Portugal

e-mail: mn.roca@fcsh.unl.pt

Abstract

Like in other countries of the European periphery, deep social and economic change has taken place over the last few decades in rural Portugal. A major outcome has been an increasing social and demographic differentiation of the rural space. However, the intensity and nature of this change have not had even impacts on all parts of the Portuguese countryside and are reflected in an increasing inner economic, social and demographic differentiation. In fact, increased interregional economic, social and demographic differentiation emerged, and new types of rural spaces can now be distinguished, such as peri-urban, intermediate and deep countryside.

This paper focuses the Lima Valley, an intermediary rural space in northwestern Portugal. Its objective is to identify the territory's main development actors that will serve as the basis for a subsequent discussion on the adequacy of some local development instruments. The discussion is based on the analyses of statistical data and policy instruments at different levels and the experience from fieldwork.

The main conclusion is that in designing the main local development instrument, the "Strategic Plan for the Development of the Lima Valley", the institutional development agents have neglected multifunctional agriculture and have only given emphasis to the multifunctionality of the rural space. This can jeopardise the sustainability of the Lima Valley's rural system since competition among producers and consumers of the rural space will give rise to environmental pressure.

Introduction

Like in other countries of the European periphery, deep social and economic change has taken place over the last few decades in rural Portugal. (Ilbery and Bowler, 1998; Covas, 1997). A major outcome has been an increasing social and demographic differentiation of the rural space. However, the intensity and nature of this change have not had even impacts on all parts of the Portuguese countryside and are reflected in an increasing inner economic, social and demographic differentiation. In fact, increased interregional economic, social and demographic differentiation emerged, and new types of rural spaces can now be distinguished, such as peri-urban, intermediate and deep countryside (Cavaco, 1996).

The deep countryside corresponds to large areas of the interior, depopulation, abandonment of agricultural land, increasing risk of environment degradation, decrease in the quantity and quality of social and cultural services for predominantly old the population, as well as growing dependency on employment in the local public sector have been the major effects of emigration and/or out-migration. Local authorities have used most of the Community and national rural development and regional policy mechanisms to improve infrastructures, especially water supply and sewage systems. On the other hand, farmers have benefited from allowances of the reformed Common Agricultural Policy (CAP) that have contributed to the extensification of agriculture which led to an increase in unemployment, land consolidation and enlargement. On the other hand, agricultural production and productivity have increased and thus farmers' average income too. Extensive pastures, vineyards, orchards and olive trees were successful examples of alternatives to rain-fed cereal crops. Over the last decade, these rural areas have become attractive to former national and foreign retired urbanites because of the environmental quality and preserved traditional rural landscapes. Game reserves, golf fields, eucalyptus forests for cellulose production, rural and cultural tourism have been the most relevant non-agricultural activities that are related to the increasing number of local development initiatives, in many cases led by newcomers, partly financed by EC funds and programmes, such as LEADER.

In rural zones of the metropolitan regions of Lisbon and Oporto or in some restricted areas near medium-size towns along the coast and in the interior, farmland has rapidly being converted to other uses due to rapid urban expansion and considerable improvement of

transport and communal infrastructure, partly financed by the Cohesion and ERDF Funds. Permanent residences of commuters, including gated communities, industrial plants, recreational and leisure areas and tourist resorts now compete with arable land, mostly covered with horticulture both for self-consumption and nearby urban market. Those are the peri-urban spaces, that is, “neither solely urban nor rural” (Ford, 1999:297).

The intermediate spaces correspond to the surrounding rural areas of small and medium-sized towns where most of the former exclusively agricultural households have been replaced by pluriactive households, i.e. those practising part-time farming but also generating income from tourism, craftsmanship and, to a lesser extent, small scale industry (Costa, 1999: 88). Also, the number of second homes of urban population and a growing number of permanent residences of ex-urbanites that chose alternative lifestyles has expanded, benefiting from significant improvements in transportation networks and, more recently, the development of telematics.

Population in the intermediate rural areas has generally stagnated or slightly increased in the 80's and 90's, but with important internal spatial differentiation. Areas near, or crossed by modern roads and near local urban centres have experienced a rapid growth, while more remote and isolated, mainly mountainous areas have been affected by ageing and depopulation. Paradoxically, these areas are rich with unexplored potentials for the development of alternative forms of agriculture, and have been most attractive to ex-urbanites.

From the intermediate rural areas originated main overseas emigration streams in Portugal in the '50s, and in the '60's and '70s intensive labour emigration to northwestern Europe. Emigrants' remittances have played a very important role as a complementary source of income to migrants' households and contributed to the development of local economy, mainly construction and retailing businesses. Return migration has been constant, including growing numbers of the pre-retired and retirees. The counterflow was more intense in the second half of the '70s when, besides from Europe, the Portuguese massively returned from the former African colonies.

Due to the process of economic and social rural differentiation described above farmers are not anymore the main population group taking part in development. (Portela, 1998; Pereira et al, 1999). New actors have emerged that are not only producers but also consumers of the rural space. Because rural change has been quite fast, there are important discrepancies between the objectives of top-down development policy measures and the actual needs and expectations of the local populations. The degree of efficiency of such measures has been low and the risk of conflicts among potential users of endogenous resources has increased. Hence, it becomes urgent to identify the major existing or potential development actors in order to correctly target direct and indirect beneficiaries. This will, in turn, lead to the design of more appropriate and effective policy instruments.

In the context of the high degree of the diversification of economic activities, the intermediary spaces described above present a wide range of local development actors. This paper focuses on the Lima Valley,¹ an intermediary rural space in northwestern Portugal. The objective is to identify the territory's main development actors that will serve as the basis for a subsequent discussion on the adequacy of some local development instruments. The discussion is based on the analyses of statistical data and policy instruments at different levels and the experience from fieldwork (formal and informal interviews and observation).²

Identification of the local development actors

Like in the rest of the peripheral rural space of the European Union (EU), rural development in the Lima Valley depends heavily on various exogenous stakeholders with multifaceted local influence, such as, the urbanites, i.e., national and foreign consumers of rural products and spaces, the national and transnational entrepreneurs and enterprises, and national government and EU institutions. The latter ones are responsible for planning, implementation and evaluation of rural and regional policies whose measures are mainly financed by the EU Structural and Cohesion Funds through the Frameworks for Community Support (FCSs) and EU initiatives. However, the implementation, feasibility and efficiency of such policy measures at the local level depend on the size and quality of the local development actors, on one hand, and on the other, on the size, diversity, capacity and strength of local institutions.

Resident rural population groups³ of the Lima Valley can be considered the main development actors. Despite an increasingly great number and diversified structure of users of the rural space, the resident population is the most affected by development constraints and most interested in the improvement of social, economic and environmental spheres of life. Hypothetical groups were proposed based on a set of discriminatory and control variables that could best identify and differentiate groups of rural development actors.⁴ They were later tested in field-research. The following groups of rural development actors emerged.⁵

Main rural development actors

Pluriactive family farmers - This is the major sub-group among permanent residents. Their main sources of income are non-agricultural activities. They mostly practice part-time mixed farming; viticulture and livestock are their main agricultural activities. The size of their landholdings, together with fragmented plots, is up to 3 ha. They are not older than 50 and many live under the same roof with their parents or parents-in-law that are the main agricultural producers. Their school attainment is higher than that of the previous generation. Women are either employed in local industry (textile, clothing and shoes), retailing or social services (public and private), or do domestic work and help in the fields. Men run micro or small size enterprises or are employed in civil construction, non-extractive industries or retailing.

Exclusive small family farmers - They are mostly old couples with absent adult children. Their land holdings are not bigger than 3 ha. Their educational level is low and they work exclusively as full-time farmers. Their number is decreasing due to their old age. Men are the main producers and practice traditional agriculture, while women are responsible for almost all of the reproductive tasks at home and do unpaid productive work in the fields. The produce is for self-consumption and occasional surplus is sold on the local market.

Entrepreneurial farmers - They are not numerous but are a relatively powerful sub-group of permanent residents. Most of them use family work. Their landholdings are between 3 and 10 hectares. Viticulture, dairy and beef cattle raising are their most important activities. The number of young farmers (including women) with professional training among them is

growing. They are mostly non-migrants but the younger ones could have experienced temporary migration related to higher education.

Rural artisans – Although they are few, they have always been important in the context of the richness in craftsmanship of the Lima Valley. Their activities are based mostly on the use of endogenous natural resources such as ceramics and linen production, granite decorative work, and embroidery. The number of young artisans among them is growing due to increasing employment opportunities related to demand from rural tourism, interior decorators, higher income local population, etc.

Permanent residents in post-working age - Their number has considerably increased in the last two decades due to, first, ageing of the native population and, second, to the continuous and likely increasing population inflow to this sub-region. Their educational level is low. They are former exclusive small family farmers who live on State pensions (national and/or foreign). They do part-time farming for self-consumption, mainly garden vegetables and small vineyards. Many are important transmitters of cultural heritage, including agricultural practice. Women are responsible for important reproductive tasks such as childcare and housework. Some have migrated abroad or to other regions of the country and majority left their children behind; they have higher consumption requirements, including the use of public and private social assistance services.

Secondary rural development actors

Students - Some attend high school. Most are daily commuters to local urban centres. Others are college students that usually return to the place of permanent residence during the weekend or once a month. They are receptors of cultural heritage. They are open to innovation as consumers of rural space for leisure and recreation. They acquired urban-type consumption habits that can only partially be fulfilled. Most live in pluriactive households or non-agricultural households.

Temporary migrants - They are mostly men, especially the young, who leave temporarily the place of permanent residence to work elsewhere in the country or abroad. They are engaged in civil construction and seasonal agricultural job. The main areas of their destination are the major Portuguese cities as well as Switzerland and Germany. They are

increasingly highly qualified workers. They are mainly consumers of the rural space for residential purposes.

Daily external commuters - They are permanent residents, quite heterogeneous and mostly young (male and female). Their place of work is in local or regional urban centres. Women work as employees in public or private social services, or in retailing. Men are employed in financial and other public and private services as employees, self-employed. They consume the rural space not only for residence but also for recreation, especially during the weekends. They are, frequently, married couples and consumers of child care facilities. The majority is autochthonous residents with no migration experience. Many live in or near their parents' or parent-in-laws' family farm households. A minority moved from urban areas because of cheaper housing costs and/or attracted by the qualities of life, intrinsic to rurality: they belong to non-agricultural nuclear families households, are skilled or highly skilled, and have urban consumption habits.

Non-agricultural entrepreneurs - They are a small but relatively important group of permanent residents, who run small or medium size businesses, mostly based on endogenous resources, located in the parish of residence or in another rural parish in the same or neighbouring county. Most of them employ only family members or a small number of local labour-force. The main sectors of their activity are rural tourism, food processing, textile, confection, shoe and sawing industry as well as civil construction and retailing. The owners of old manor houses, belonging to the local elite, constitute a minor but influent sub-group.

Emigrants - They are seasonal male or female sojourners, usually in age 40 or older. Their income is relatively low compared with that of the native population of the country of permanent residence. They return regularly to their rural area of origin during the summer vacations and/or long holidays (Christmas and Easter). Most had their houses built in the place of origin since they have emigrated. They are seasonal consumers of non-durable goods and of private urban types of services (such as banking, insurance, etc), and their remittances continue to be an important source of income for the family or relatives at the place of origin.

Retired sojourners - They can be out-migrants, emigrants or foreigners, and are considerably heterogeneous in terms of their former occupations. They are consumers of

rural space (housing, recreation and leisure), with higher consumption standards (goods and services), and divide their time between the place of origin and the place of permanent (commonly urban) residence.

Second home non-retired residents - They consist of older active population and their dependants. Most are homeowners, and the length of their stay depends on the time distance from the place of permanent residence, on school calendars and/or on work demands (weekends, long holidays, and summer vacations). A great majority is employed. Some were born in the sub-region. As road accessibility improves, the number of residents in regional/national centres with no former links with the rural area is increasing. They are consumers of leisure, recreational facilities and non-durable goods.

Viable development options and pre-requisites

In view of the Lima Valley human resource base described above, the following can be considered as viable development options for rural actors, primarily producers:

- to invest in high quality endogenous products, especially related to viticulture and dairy farming or fruit cultivation so as to take advantage of growing demand standards of urban regional/national population;
- to launch new or improve the existing agriculture-based activities such as dairy and meat products, and linen in small production units;
- to introduce or improve autochthonous breeds of small and big cattle, especially in the mountainous areas;
- to preserve the cultural landscape, as a commodity, through “nature gardening”;
- to introduce or improve agri-environment measures, especially organic farming;
- to introduce and/or improve innovative/creative activities that require higher skills and capacities in accordance with the educational attainment level of the young generations;
- to develop the construction sector as a job alternative for temporary emigrants with adequate skills;
- to develop craftsmanship based on the endogenous cultural richness as an important source of employment for both men and women;

- to commodify the rural landscape through the development of rural tourism as an alternative source of income for pluriactive family farmers;
- to commodify the reproductive tasks of women by opening employment opportunities in social assistance and child care provision.

However, there is a wide range of conditions that should be fulfilled in order to facilitate involvement of rural development actors. For example, for the improvement of productive and/or job creation activities, it would be necessary:

- to establish new or improve the existing basic infrastructures such as water supply, sewage systems, solid waste treatment, etc;
- to invest in the construction of new roads or in the improvement of new ones;
- to establish or improve proximity services such as child care and social assistance services for the old;
- to establish or develop recreational and leisure amenities;
- to encourage, through fiscal benefits, investment in productive and/or job creation activities in order to offset the effects of real estate speculation;
- to provide organisational and technical assistance in the commercialisation and marketing of local products;
- to ease access to credit for SMEs;
- to establish co-operation with regional/local educational institutions in the development of adequate curricula to rural development needs;
- to offer professional training courses, particularly for the young;
- to encourage training-of-trainers, especially among older people who could transmit traditional skills;
- to encourage the establishment and expansion of partnership networks, including producers' associations;
- to enhance local consulting services for capital investments;
- to improve and diversify the supply in rural tourism;
- to finance socio-cultural research and marketing studies as a base for the strengthening of craftsmanship;
- to financially support retailing and service activities oriented to consumers with urban habits;

- to support technically and financially enterprise incubators, attractive to young entrepreneurs.

Furthermore, in order to strengthen specifically farming, it would be necessary, for example:

- to create conditions to revitalise the agricultural population;
- to promote efficiency in farm enlargement and land consolidation;
- to provide rural extension services in order to ease time and labour consuming farming tasks, and to improve the quality of products;
- to minimise the constraints of the Common Agricultural Policy of the EU on intensive land use;
- to minimise climatic hazards;
- to neutralise biases related to gender roles, especially those against women;
- to encourage market oriented initiatives in small exclusive or pluriactive family farming;
- to provide financial incentives for agriculture as “nature gardening” through state pensions and EU subsidies.

Concluding remarks

Most of the development options and conditions listed above are included in the *Strategic Plan for the Development of the Lima Valley*, conceived as the framework for future actions of supra-local, local and central governments and other relevant agents at the local and regional level in the context of the Portugal’s Framework for Community Support 2000-2006 (Quatenaire, 1999: 2).⁶

The Strategic Plan’s main goal is to promote a sustainable productive basis that should be capable of retaining an increasing skilled and highly educated young population, attracting active population to live permanently in the Lima Valley as well as of guaranteeing higher levels of social and economic cohesion. To realise such a goal the Lima Valley has been envisaged as a multifunctional space where alternative land uses to agriculture, such as environmentally friendly industries, rural tourism and high-quality residential function are encouraged. This is in harmony with one of the principles of the new EU rural development policy, the second pillar of the restructured CAP, i.e., “a multisectoral and integrated

approach to the rural economy in order to diversify activities, create new sources of income and employment and protect the rural heritage”. (website: europa.eu.int)

However, the Strategic Plan does not pay adequate attention to another principle of the reformed CAP, i.e., the multifunctionality of agriculture. This principle is understood as the “varied role of agriculture over and above the production of foodstuffs [that]...implies the recognition and encouragement of the range of services provided by farmers”. (website: europa.eu.int)

Indeed, most development actions proposed in the Strategic Plan are not directed to the main rural development actors, that is, the pluriactive family farmers, the exclusive small family farmers and the permanent residents at post-working age, all practising part-time or full-time agriculture for self-consumption and, at the same time, protecting the environment and maintaining the traditional rural landscape of the Lima Valley. This is one of the most important roles of multifunctional farming.

Hence, by neglecting this type of farming and giving emphasis only to the multifunctionality of the rural space, the policy designers and decision-makers can jeopardise the sustainability of the Lima Valley’s rural system, since competition among producers and consumers of the rural space will give rise to environmental pressure.

Endnotes

¹ The territory of the Lima Valley encompasses four *concelhos* (counties): Viana do Castelo, Ponte de Lima, Ponte da Barca and Arcos de Valdevez.

² This paper is part of an on-going research project of the Centre for Geographical and Regional Planning Studies, Universidade Nova de Lisboa, about human resources and sustainable development of the Lima Valley.

³ Resident population is defined as the population that lives permanently or temporarily in a territory. Although they are increasingly important as consumers of the rural space, tourists, travellers, traders and other visitors of rural areas are not in the focus of attention here.

⁴ They were: previous attachment to the place of residence, type of use of the rural space, participation in the labour force, place of work or study, pluriactivity, age and gender, employment relations, migrant status. See the justification of this selection in Roca (1999).

⁵ Here, groups of individuals rather than households are proposed as the basic unit of analysis. Studies of resource, time and task distributions, employment and income patterns as well as of differences in expenditure, consumption patterns and welfare status within the household have proven that there are considerable intra-household gender and age-related differences. Members of the same household can belong to different groups of stakeholders. They can share the same interests but also compete for resources. While some members of the household can benefit others can be adversely affected by a development initiative brought about by an influential group of stakeholders (FAO, 1998).

⁶ This major policy instrument for the Territory was promoted by VALIMA (*Association of the Counties of the Lima Valley*). It was founded in 1994 and congregates representatives of all four local governments. It coordinates the programmes adopted by the local governments and financed by the central government and Community structural funds and initiatives. The four main lines of action are economic and social development; territorial planning, environment protection, rehabilitation and revival of town centres and cultural heritage.

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