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Local perspectives and analysis
of the impact of Chinese migration in Colombia

Perspectivas locales y análisis del impacto
de la migración china en el territorio nacional colombiano

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Abstract

Chinese migration has been driven by migration policies in Colombia contributing to factors such as the strengthening of diplomacy, economic opportunities, cultural exchange, etc. Due to the cross-border opening, Colombia has been able to attract a significant number of Chinese migrants generating a favorable environment for new opportunities and improving their living conditions. The objective of this research is to analyze the local perspectives of Chinese migration in Colombia and its impact on local development. A descriptive quantitative approach methodology was implemented through a deductive method to deepen the perceptions and impact in the national context. The instrument entitled "PMI Universidad ECCI" was designed and validated corresponding to its centuries: Perspectives of International Migration which inquired in 15 items of three perspectives: economic, social and cultural perspectives evaluated on a Likert scale. A sample of 93 professional experts in international trade was used. The findings revealed that Chinese migration has generated a significant impulse in the development of the Colombian national territory, providing employment and cultural diversity, likewise, a permanent cooperation between north and south is suggested, promoting solid foreign and migration policies that promote inclusion. Finally, it is concluded that there are challenges and opportunities in terms of integration and equity in local conditions for the strengthening of international relations between both countries.

Keywords

Migration, bilateral relations, China, Colombia, prospects, diplomacy, exchange, policies.

Resumen

La migración china ha sido impulsada por políticas migratorias en Colombia contribuyendo a factores como el fortalecimiento de la diplomacia, oportunidades económicas, intercambio cultural, etc. Debido a la apertura transfronteriza, Colombia ha logrado atraer a un número significativo de migrantes chinos generando un ambiente propicio para nuevas oportunidades y mejorar sus condiciones de vida. Esta investigación tuvo como objetivo el análisis de las perspectivas locales de la migración china en Colombia y su impacto en el desarrollo local. Se implementó una metodología de enfoque cuantitativo de tipo descriptivo por medio de un método deductivo para profundizar las percepciones e impacto en el contexto nacional. Se diseñó y validó el instrumento titulado "PMI Universidad ECCI" correspondientes a sus siglas: Perspectivas de la Migración Internacional el cual indagó en 15 ítems de tres perspectivas: económica, social y perspectivas culturales evaluadas en una escala Likert. Se utilizó una muestra de 93 profesionales expertos en comercio internacional. Los hallazgos revelaron que la migración china ha generado un impulso significativo en el desarrollo del territorio nacional colombiano, aportando empleo y diversidad cultural, asimismo, se sugiere una cooperación permanente dada entre norte-sur promoviendo políticas exteriores y de migración sólidas que fomenten la inclusión. Finalmente se concluye que existen desafíos y oportunidades en términos de integración y equidad en condiciones locales para el fortalecimiento de las relaciones internacionales entre ambos países.

Palabras clave

Migración, relaciones bilaterales, China, Colombia, perspectivas, diplomacia, intercambio, políticas.

Introduction

International migration has been a global phenomenon with significant challenges for economic, political, social and cultural development. Regarding these difficulties, there are complex issues due to a constant flow of people looking for improvements in living conditions, human rights, security and social participation. In this sense, this article addresses Chinese immigration in Colombia, exposing its impact on public policies in the country. Consequently, the causes and consequences of this migration are analyzed in social, cultural and economic terms, providing a deeper understanding of the temporary or permanent displacement of individuals to other territories.

Chinese migration has increased in Colombia, generating significant impacts on the social, cultural and commercial dynamics of the entire Latin

American region. This migration has introduced new elements of Chinese culture into the daily life of the country. This situation has presented challenges and opportunities for both nations, contributing to the strengthening of diplomatic relations between China and Colombia.

When analyzing this problem, several causes were identified, among which poverty, inequality, discrimination and persecution. These factors, among others, have contributed to the lack of access to opportunities, turning migration into a multifactorial event. In this context, international migration between China and Colombia has presented not only challenges, but also opportunities that have promoted social and cultural well-being through international cooperation. This approach has made it possible to face problems such as human trafficking, labor exploitation, xenophobia, among other aspects.

This required collaboration between binational relations, transit and destination, as well as increased investment in programs that contributed to the socio-economic integration of migrants. In contrast to the above, the research of this social problem was carried out to know the realities of Chinese migration in Colombia and its impact on national development through bilateral relations that provided an analytical perspective to the scientific community.

It is essential to recognize the role of international migration in the field of trade and international relations. According to Silva *et al.* (2019), China has experienced a significant increase in South American economies, mainly due to increasing foreign investment that has driven economic growth in the region. This Chinese interest has been reflected in its willingness to establish trade agreements and invest in Latin American countries, in order to boost development levels and strengthen ties with Latin America.

In this context, this article is structured in four main sections. The first section comprises a literature review that highlights the importance of Chinese migration in Colombia. The second section describes the methodological aspects used in this study. The third section presents and analyzes the results obtained. Finally, the fourth section encompasses the final findings and considerations arising from the investigation.

Literature review

The following are recent studies related to the immigration of the Chinese community to the Colombian national territory. Three categories were esta-

blished to develop this section: Trade and immigration; Impact of immigration in the receiving country; and Chinese migration at the international level.

Regarding the first category, three investigations stand out, the first proposed by Ramírez (2019) highlighting the trade policy during the first year of the government of Donald Trump with the objective of defending trade and national interests through trade policy; the results suggest that the promotion of free trade agreements with the United States of America occurred with the strengthening in trade partners resulting in China winning in geopolitical and economic aspects in the trade fight. The second category raised by Buckley and Iglesias (1998), evidence the results on foreign merchants of immigrant in Madrid, which allowed to investigate the main commercial activities of immigrants. The findings indicate that commercial activities are not centralized according to nationality, but respond more to a political and social context, reflecting an integration process into society. And the third research, conducted by Sajir (2021), explored the interrelationship between trade and migration, highlighting its influence on the global ecological environment. This research offered a critical view of capitalism and international agreements, evidencing a capitalist accumulation through the exploitation of natural and human resources to meet the demands of the global economy.

Thus, migration and trade are interrelated factors that promote the development of nations through the exchange of knowledge to encourage international relations and the development of foreign trade operations.

In the second category three studies are highlighted. The first, conducted by Nadali, (2007), makes an analysis of Asian migration and business contribution in Spain, highlighting the role of Chinese immigrants in the cross-border economic axis for the local economic development; the results show the social, economic and cultural dynamics with Chinese immigration and wholesale trade in Madrid. The second research, carried out by Pasichnyk (2019), examined the economic effects on the receiving country through a comparison between migrant and non-migrant wages. The results revealed a theoretical and empirical relationship in the labor market of the country of origin, highlighting its impact on the sustainable development of the nation. This study contributed to higher wages and lower unemployment. The third category established by González *et al.* (2023), analyzed China's zero-COVID policy and the status of international migration based on development theories. The findings of this study revealed a pragmatic approach that resulted

in consistent economic development in the face of the challenges generated by the Covid-19 pandemic, restoring conditions for international migrants.

In the third category, research was conducted by Fleischer (2012), who noted that Chinese immigration was the most significant worldwide. The objective of this research was to carry out a historical analysis of the Chinese diaspora in different contexts. The results revealed the absence of regulatory anti-migration laws in such contexts.

The analysis of previous research showed that international migration has generated an increasing interest in aspects of mobility, culture, as well as social and economic aspects. These have been directly linked to bilateral or multilateral relations between countries. Results and advances in migration policies were identified, with the purpose of regulating and promoting fair and legitimate conditions in society in general.

Foreign policy of Colombia

The foreign policy of the national territory was marked by its international relations based on democracy and diplomacy, articulated by public policies of internal and external character. According to Cano (2022), the country's foreign policy was fundamental due to its territorial position, which allowed the extension and internationalization of its borders. However, throughout history, there have been short-term situations in relation to migration and territorial and maritime concessions to neighboring countries. Despite this, there have also been political and economic benefits derived from the country's foreign policy, which has strengthened development and contributed to the improvement of living conditions.

In this framework of international relations, Colombian foreign policy contributed to optimal foreign policy conditions of the dynamism of the State and the role of society, responding to globalization through international organizations, positioning the country in a sustainable and equitable way that adapted to the new world order (Espinosa, 2022). While it is true that Colombia's foreign policy developed under diplomacy is relevant to articulate science and technology in international relations, aspects such as entrepreneurship, innovation, productivity and competitiveness, etc. were strengthened, oriented as a source of development and growth through cooperation and scientific mobility, strengthening the local economy (Pineros *et al.,* 2022).

In short, international relations facilitate multiple scenarios for economic, social, cultural development, etc. According to Vega and Peñaloza (2022), each time countries were integrated for development purposes, international relations between countries were considered. Bustamante *et al.* (2022) highlighted the interest of conducting e-commerce operations through international marketing to counter the migratory phenomenon, turning migrants into potential goods and services in the receiving country. Finally, this was reaffirmed by Paipa (2021), who exposed the effects of electronic commerce in a cross-border way responding to China's international trade relations for Latin America through strategies to couple in the local economy, responding to the evolution of the country's foreign policy as a response to international commitment.

International migration

International migration co-existed as a global phenomenon that has an impact on the contexts, transforming the dynamics of both receiving and sending countries, addressing a comprehensive perspective to face and take advantage of the inherent challenges (Barrios, 2021).

Velásquez (2022) presented crime as a phenomenon of migrants. Poverty and lack of opportunities for criminal behavior were also important for analyzing the causes of crime, undoubtedly this was a factor of the multiplicity of migratory situations at the international level. Likewise, it was possible to take advantage of local development among nations by cooperating between the transfer of knowledge, competences, enriching the receiving nation and establishing mechanisms for safe and controlled migration (Méndez and Gómez, 2021).

Finally, international migration for Giraldo *et al.* (2020) contributed significantly to the business growth boosting the flow of goods and services that favored the companies of the receiving country, through labor mobility by strengthening competitiveness and innovation as a response to the internationalization processes, since the number of travelers per continent cooperates with migration policies, where they were beneficial for economic and social development thanks to the exchange of knowledge. In accordance with the above, the international migration of travelers per continent was recorded during the period (2019-2021) (see Table 1).

Table 1

Number of international movements of all travelers
by continent of origin or destination (2019)

2019				
Continent	**Departures**	**Entries**	**Total movements**	**Balance**
South America	2.761.571	2.789.568	5 551 139	27,997
North America	2 344 676	2 193 378	4 538 054	-151 298%
Central America and the Caribbean	2 131 436	2 180 797	4 312 233	49,361
Europe	1 149 633	1 007 050	2 156 683	-142 583%
Asia	38,806	17,210	56 016	-21 596%
Oceania	17,811	8664	26,475	-9 147%
Africa	3870	2075	5945	-1,795
Antarctica	0	0	0	0
Not applicable	1	1	2	0

Note. UAEMC. DANE (2022).

According to the 2019 data in Table 1, a total of 5,551,139 were revealed of which 2,761,571 are departures of emigrants and 2,789,568 entries in South America, with a positive balance of 27,997 movements. North America had a total of 4,538,054 movements, meaning that migrants searched for citizenship in their country of arrival, so the flow of migrants from Asia corresponded to 38,806 in search of better opportunities, of which mostly China arrived in Colombia in search of better living conditions given the emergence of the COVID-19 health emergency in Wuhan (Tsegay, 2023).

Table 2

Number of international movements of all travelers
by continent of origin or destination (2020).

2020				
Continent	**Departures**	**Entries**	**Total Movements**	**Balance**
South America	622,604	643 054	1 265 658	20,450
North America	811,925	761 597	1 573 522	-50 328%
Central America and the Caribbean	568,998	608 520	1 177 518	39.522
Europe	302,248	275,956	578 204	-26,292
Asia	8426	6251	14,677	-2175%
Oceania	5654	2577	8231	-3077
Africa	1249	943	2192	-306%
Antarctica	0	0	0	0
Not Applicable	5	19	24	14

Note. UAEMC. DANE (2022).

In Table 2, the Americas led in departures and entries, with North America recording the highest number of departures and entries of migrants with 811,925 departures and 761,597 entries. For South America, a total of 1 265 658 movements were recorded, while for the Asian continent a total of 14 677 movements were recorded. Cattaneo and Foreman (2023) pointed out that the climate could also have been considered a reason to make the decision to seek a destination, with the climatic conditions of this continent being a good alternative. This would explain why it continues to lead in the number of exits and entries. In addition, it was noted that Chinese migration was more restricted due to measures taken by COVID-19, since the outbreak of the pandemic originated in that country and was therefore more tightly controlled to prevent its spread. It is important to note that this pandemic significantly restricted China's migration inflows and outflows to other countries.

Table 3

Number of international movements of all travelers
by continent of origin or destination (2021)

2021				
Continent	**Departures**	**Entries**	**Total movements**	**Balance**
South America	594 198	685,978	1 280 176	91,780
North America	2 182 818	2 038 218	4 221 036	-144,600
Central America and the Caribbean	1 187 801	1 089 273	2 277 074	-98 528
Europe	473 329	410 404	883,733	-62,925
Asia	18.172	18,215	36.387	43
Oceania	693	2100	2793	1407
Africa	3559	2599	6158	-960%
Antarctica	0	0	0	0
Not applicable	52	36	88	-16%

Note. UAEMC. DANE (2022).

According to the data presented in Table 3, it is observed that North America recorded the highest number of departures and entries, totaling 4 221 036 movements, followed by Central America with 2 277 074 and South America with 1 280 176 movements, respectively. By 2021, however, North America became the most visited destination. According to Christensen and Simon (2023), this trend could be attributed to measures taken by countries such as the United States, which seek to combat irregular migration by offering help to their immigrants. On the other hand, in the case of China, migration to Colombia showed a notable decrease in total movements compared to 2019, attributable to the effects of COVID-19. During 2021, there was a greater restriction on Asian outflows to other countries, with the Chinese population showing greater caution due to health concerns.

Table 4

Number of entries, total departures and international movement balances of all travelers by sex (2019-2021)

		2019	2020	2021
Departures	Women	4 131 914	1 115 755	2 204 072
	Men	4 315 546	1 205 231	2 256 380
	Total	8.447.804	2 320 986	4 460 452
Entries	Women	4 011 488	1 108 207	2 085 831
	Men	4 186 861	1 190 585	2 160 822
	Total	8 198 743	2 298 792	4 246 653
Total movements	Women	8 143 402	2 223 962	4 289 903
	Men	8 502 407	2 395 816	4 417 202
	Total	16 646 547	4 619 778	8 707 105

Note. UAEMC. DANE (2022).

In Table 4, it was observed that the year with the highest number of total movements was 2021, with a total of 8,707,105 movements. Comparing the total movements of 2021 with those of 2019, an increase in the flow of people over the years was evidenced, with an upward trend in the flow of people, both men and women, during the analyzed period. This increase could be associated with pandemic data, which encouraged large numbers of people to migrate. According to migratory pressures on G5 countries, there was a greater incentive and recipient countries got a lot of help (Angin *et al.,* 2023).

Table 5

Number of entries, departures and total international movements of all travelers by reason of the trip (2019-2021)

Reason for travel	2019			Reason for travel	2020			Reason for travel	2021		
	Departures	Entries	Total		Departures	Entries	Total		Departures	Entries	Total
TOURISM	5 446 614	3 168 745	8 615 359	TOURISM	1 431 293	926 647	2 357 940	TOURISM	2 941 950	1 851 332	4 793 282
RESIDENCE	904 455	3 551 720	4 456 175	RESIDENCE	411 372	950 084	1 361 456	RESIDENCE	770 248	1 752 750	2 522 998
WORK	689 043	433 699	1 122 742	WORK	98 516	36 048	134 564	WORK	168 558	95 586	264 144
CREW	326 763	217 653	544 416	CREW	115 353	94 334	209 687	CREW	188 570	185 805	374 375
OTHER	786 234	697 680	1 483 914	OTHER	132 878	199 544	332 422	OTHER	244 358	243 717	488 075
STUDY	147 357	62 519	209 876	STUDY	40 867	12 606	53 473	STUDY	61 264	24 027	85 291
EVENTS	147 338	66 727	214 065	EVENTS	90 817	79 654	170 471	EVENTS	85 586	88 526	174 112
Total	8 447 804	8 198 743	16 646 547	Total	2 321 109	2 298 917	4 620 026	Total	4 460 534	4 241 743	8 702 277

Note. Adapted from UAEMC data. DANE (2022).

According to the figures in Table 5, it can be observed that the reason for travel with the highest number of departures in 2019 was "tourism", while the reason for travel with the lowest number of entries in 2020 was "education". In addition, it was noted that there was a 16.64% increase in the total international movements of all travelers due to travel in 2021 compared to 2020. In general, it was concluded that most migrants used Tourism as the main reason to migrate from these countries, however, education although it is low, if it turned out to be a more concrete option where the migrant can have better job guarantees and conditions that allow him/her to have a better quality of life (Passi, 2023).

Chinese diaspora

Members of the Chinese diaspora presented diverse character backgrounds; economic, cultural, social, educational and personal, as well as very different life and emigration histories. According to Guotu (2021), the Chinese diaspora has made important contributions to the modernization of China and raised that there are more than 10.7 million Chinese immigrants living abroad in the world. For Fleischer (2012), this community is the most numerous of all migrants worldwide, also, the author explained that many migrants arrived in the national territory as part of illegal migration to continue to the U.S. market.

The Chinese diaspora encourages transnational mobility and strengthens economic, cultural, and tourism aspects in various ways. On the one hand, the Chinese diaspora promoted the connection between different communities through migration and cultural exchange, which enriches both the country of origin and the country of destination. Moreover, this transnational mobility has fueled the development of tourism, as many members of the Chinese diaspora return home to visit their families and explore their culture and heritage. In this sense, the diaspora promoted transnational mobility through binational exchange in a framework of migration policies that had a significant impact in terms of development opportunities (Zhu, 2023), since millions of people were displaced from China to the rest of the planet. Indeed, the Chinese diaspora in Latin America has had a significant impact on the region, influencing policy and mobility. However, nationalist gaps have been argued, although mutual support and coordination to achieve adequate inclusion in the markets has also been highlighted (Montoya, 2021).

Chinese migration in Colombia

The migration of Chinese population to Colombia was a phenomenon of the migration that included regions of Taiwan, Hong Kong and Macau. For Gómez and Díaz (2016) the estimated population of Chinese residents in Colombia is approximately 25,000. The first Chinese arrived in the country by 1854 and currently make up their own neighborhoods in the national territory giving an overview of Chinese migration in Colombia.

Fleischer (2012) revealed that the Chinese diaspora has different economic, cultural, social, educational and personal backgrounds, so the first Chinese migration to Colombia occurred between 1970 and 1980, this began with the political upheavals in China that led to the creation of two factions, one pro-communist and one anti-communist. The pro-communist faction was established in Colombia, while the anti-communist faction was established in other Latin American countries. The second wave of Chinese migration to Colombia occurred in the 1990s, this time due to China's economic opening. The Chinese started investing in Colombia, and many Chinese workers came to the country to work in these companies. The third wave of Chinese migration to Colombia occurred in the 2000s, this time due to China's economic growth. However, this growth was accompanied by illegal and massive migration, as many Chinese began to migrate to Colombia in search of better economic opportunities and tax cuts.

Migration was a very common phenomenon in the man who has always been present in civilization (Gutiérrez *et al.,* 2020), they usually looked for the best options, that is why most of the Chinese who live in Colombia are concentrated in the main cities of the country, such as Bogotá, Medellín, Cali and Barranquilla. They have been mainly engaged in trade, restoration and construction. The Chinese community in Colombia had a positive impact on the country. This concentration in Colombia's major cities is due to a confluence of economic, political and cultural factors that attract Chinese immigrants seeking better opportunities and a better life in Colombia, since it generated important business centers for the Chinese community. In addition, these cities developed extensive infrastructure and a range of employment opportunities that helped Chinese immigrants integrate into Colombian society. This permeated economic growth and cultural development, leading to the emergence of new educational institutions and businesses, the creation of jobs, and the promotion of cultural exchange between China and Colombia.

Chinese culture in Colombia

Chinese culture in Colombia was the result of the presence and influence of Chinese immigrants and their descendants in the South American country. According to Creutzfeldt (2023), there were around 57,000 people of Chinese origin in Colombia, most of them in the cities of Bogotá, Cali and Barranquilla. Chinese culture manifested itself in various aspects of Colombian life, such as gastronomy, art, education, sport, and commerce (see Figure 1).

Figure 1

International volumes of migrants from China (1995-2015)
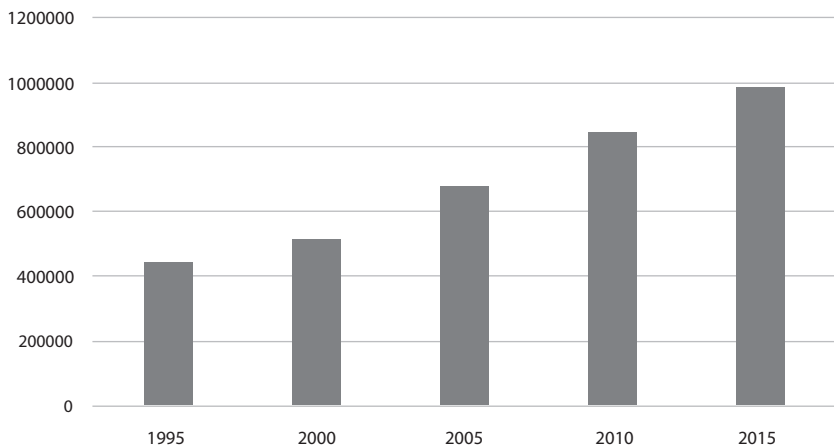
Note. Adapted from the United Nations Population Division, Trends in Total Migrant Stock (2012).

In addition, these cities developed extensive infrastructure and a range of employment opportunities that helped Chinese immigrants integrate into Colombian society. This permeated economic growth and cultural development, leading to the emergence of new educational institutions and businesses, the creation of jobs, and the promotion of cultural exchange between China and Colombia.

- The Colombo China Association, founded in 1977, offered language courses, conferences, exhibitions, publications and cultural events related to China.
- The Chinese Colombo Cultural Center, established in 2007, was dedicated to the teaching of Mandarin and Chinese culture, as well as the generation of commercial, social and political ties between the two countries.
- The Colombo China House of Culture organized cultural displays such as lion and dragon dances, taichi and kung-fu presentations, and exhibitions of gastronomic and commercial ventures that highlight the value of Chinese and Colombian cultures.
- Jorge Tadeo Lozano Confucius Institute of the University of Bogotá offered student scholarships, language and culture courses, and academic and artistic activities on China.

These were some of the various organizations through which the Chinese have managed to develop in Colombia through cultural exchange. Despite cultural differences, as indicated by the Ministry of Foreign Affairs (2019), these migrants have overcome various obstacles by expressing the diversity and richness of both cultures. This is taking place in the framework of a shared history of diplomatic, commercial and cultural relations between the two peoples. However, the presence of Chinese culture has been more notable in urban areas, especially in the capital, and in cities with more established Chinese communities, which were able to develop a cuisine, through Chinese restaurants that are very common and appreciated by many Colombians, since they have adapted it to local tastes (Gómez and Díaz, 2016).

In major cities such as Bogotá, Medellín, and Cali, Chinese communities have established businesses and are active in commercial activities. The celebration of Chinese New Year has contributed to its increased visibility, with events and festivals organized to commemorate this important holiday of Chinese culture. This has generated a recognition and respect from Colombians towards these communities, which is reflected in the growing involvement of businesses and investments with a Chinese presence in the business environment. Chinese companies have invested in infrastructure projects and other economic areas in Colombia, demonstrating their impact on the country's economy. Traditional art and culture with the practice of martial arts, such as kung fu, and other traditional Chinese artistic expres-

sions have also achieved a space and can be found in many places where the Chinese community was more active and generated sports meeting spaces where young Colombians practiced this discipline.

Materials and method

For the present study, a quantitative research was carried out, following the methodology proposed by Calizaya *et al.* (2020), which included measurable and quantifiable information to ensure robust and concrete data. This approach contributed to verifiable results and avoided ambiguity in the information provided. The study started from the approach of the problem to the understanding of the findings. The methodological design used was mainly deductive, according to Espinoza (2023), being a research strategy that starts from the general towards the specific, which facilitated the obtaining of reliable conclusions. In addition, it was deepened through a descriptive research, allowing the exposure and analysis of the perspectives of the impact of Chinese migration in the Colombian territory, as described by Ramos (2020).

For conducting the study, the information was obtained by an instrument called "PMI Universidad ECCI" for its acronym "Perspectives of International Migration", which is a closed survey type instrument with a total of 15 items that measures three perspectives of migration: economic, social and cultural, valued with a five-point Likert scale: (1) Totally disagree (2) Quite disagree (3) Neither agree, nor disagree (4) Quite agree (5) Totally agree.

Subsequently, the design and validation process of the instrument was carried out, which had a group of experts in the collaboration of the construct, with the purpose of identifying local perceptions on Chinese migration in Colombia. Three categories were designed in consideration of a broad vision of the research oriented to the fulfillment of the study that would allow obtaining the validity and reliability of the questionnaire. The experts exposed their adjustments until the appropriate adaptation. The reliability assessment of the total instrument items is presented in Table 6.

Table 6
Instrument Reliability Assessment

Case Processing Summary		N	%
	Valid	93	100.0
Cases	Excluded	0	, 0
	Total	93	100.0
a. List deletion is based on all variables in the procedure.			

The information collected was analyzed using Statistical Package for the Social Sciences (SPSS) version 29.0 software. Through a scale reliability test, it was possible to establish that the reliability coefficients are presented in table 6. In this case processing summary, a total of 93 participants were registered, which is equivalent to 100% validity; none were excluded from the analysis

Table 7
Instrument scale statistics

Scale Statistics			
Average	**Variance**	**Standard Offset**	**N of elements**
59.08	18.157	4.261	15

The instrument was designed as a Google form, applied with the authorization of the population under study, who accepted an informed consent. As for Table 7, it related the statistics of scale of the instrument, evidencing variance, standard deviation, and the total of 15 items investigated.

Population and sample

The participating population corresponded to professionals who are experts in international relations or business in the Colombian national territory. The sample corresponded to 93 professionals with undergraduate training in this area of knowledge corresponding to:

- Managers in international business (16)
- International Business Professionals (28)
- Foreign trade professionals (34)
- Foreign Trade Management Technologists (12)
- Other professionals (3)

The selection of the sample was made by means of a non-probabilistic sampling for convenience within the Colombian national territory, which counted on the participation in 15 departments (see table 7).

Table 8

Number of participants by department

Department	Total participants
Antioch	2
Arauca	1
Atlantic	1
Bogota D.C	34
Bolivar	3
Boyacá	4
Caldas	3
Cesar	5
Cundinamarca	14
Target	2
Quindío	2
Risaralda	2
Santander	4
Tolima	11
Valle del Cauca	5

Results

52.2% of participants were male, and 47.8% female; with respect to socioeconomic characteristics 55.4% belonged to stratum 3 at the national level, followed by stratum 2 with 29.3%, and the remaining corresponded to the other socioeconomic strata. According to the age range, 48.9% ranged from 31 to 45 years, followed by 37% corresponding to the range of 18 to 30 years, finally 14.1% corresponded to over 50.

Figure 2

Economic Outlook of Chinese Migration in Colombia
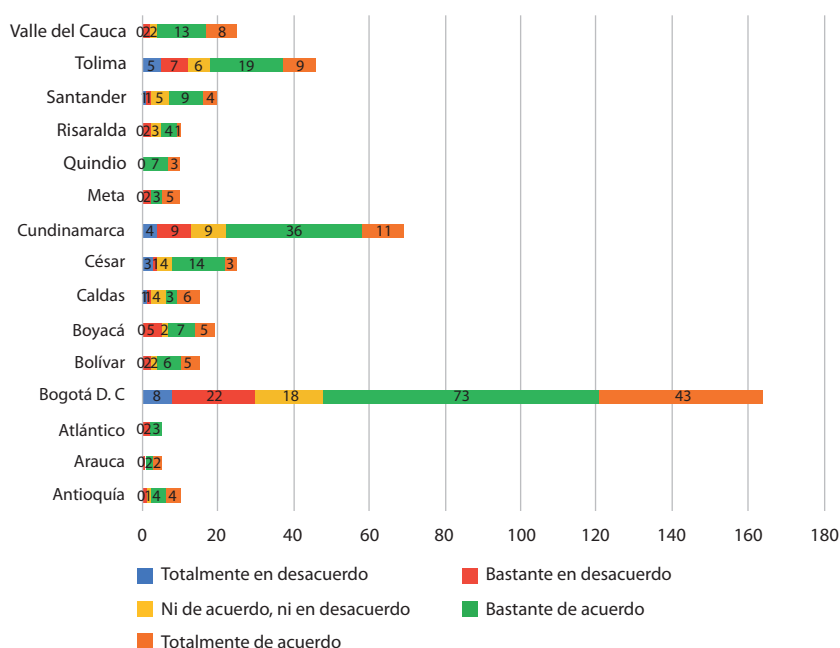
According to the results presented in Figure 2, the economic perspective of Chinese migration in Colombia indicates that the most valued categories were Totally agreed and Quite agreed in the departments of Bogotá (116 registers), Cundinamarca (47 registers) and Tolima (28 registers). These findings show a widespread perception of business growth that has contributed

to business stability through mutual cooperation. This is in line with Verver and Koning (2023), who point to Chinese migrants' encouragement of entrepreneurship. Furthermore, Zhu and Qian (2021) support this idea by exposing various causes of national and international migration from China, such as social capital, income levels and the search for better economic and professional opportunities outside their home country. This has contributed to the creation of work spaces differentiated by race and gender.

Figure 3

Social Perspective of Chinese Migration in Colombia
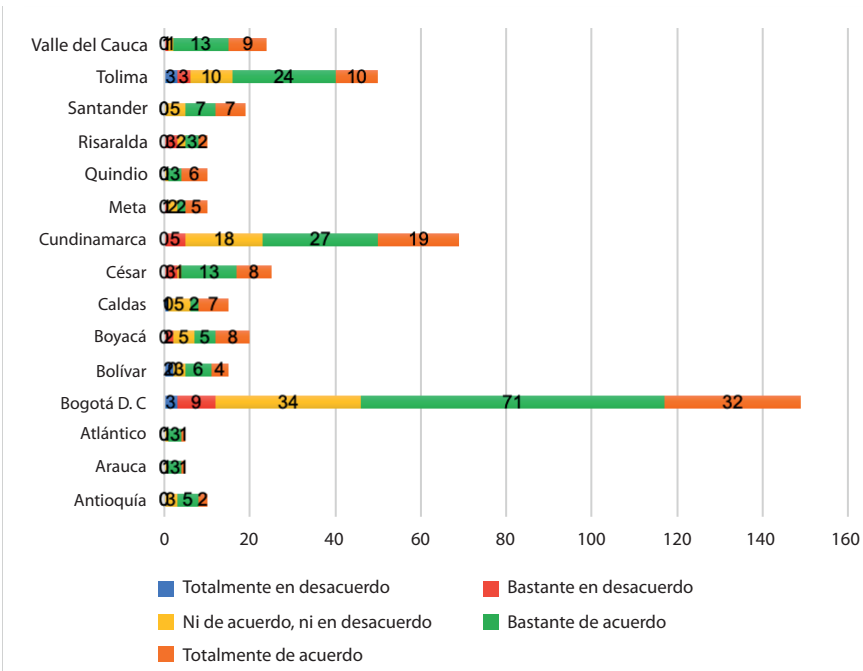
According to the data in Figure 3, the social perspective of Chinese migration in Colombia recorded that the categories with the highest valuation were totally agree and quite agree. In the departments of Bogotá there were 103 registers, Cundinamarca 46 registers, Tolima 34 registers, evidencing a social contribution that distinguished itself from the investment in education, employment and economic stability that Chinese migrants have contributed

to Colombia, therefore, the Chinese community demonstrated a great interest in being participatory achieving dynamism in society (Kingman, 2021). However, according to Chakraborty and Maity (2020), the Covid-19 pandemic generated significant effects in China, affecting migration, society and the environment. The authors highlighted the impact on mobility, travel restrictions, such as border closures, which made it difficult for migrants to transit internationally.

Figure 4

Cultural perspective of Chinese migration in Colombia
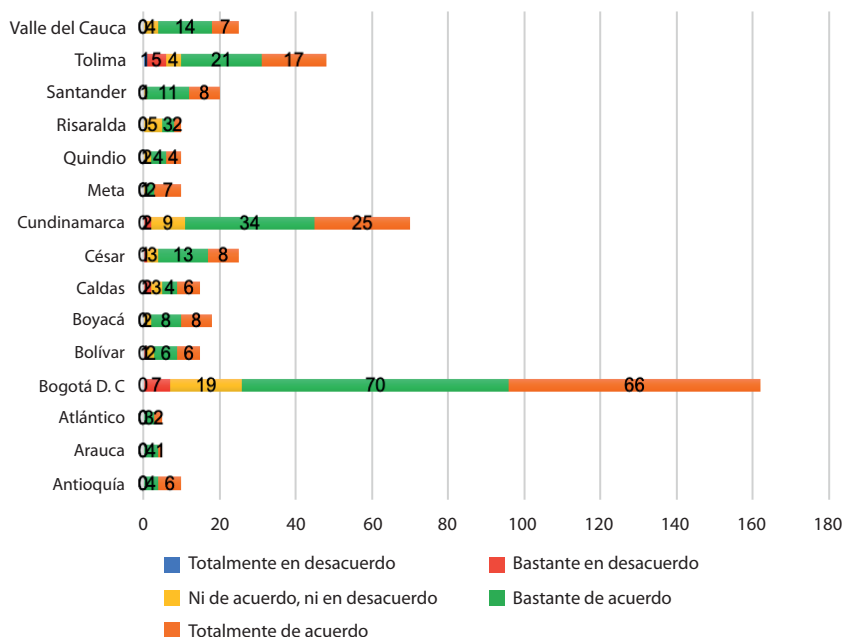
According to the data in Figure 4, the cultural perspective of Chinese migration in Colombia recorded that the categories with the highest valuation were totally agree and quite agree. In the departments Bogotá there were 136 registers, Cundinamarca 59 registers, Tolima 38 registers. The cultural contribution was more framed in the cities of greater population where the already established Chinese communities motivated a cultural exchange, sin-

ce, their country of origin is known by its culture, drive and discipline, which has allowed it to be one of the great international powers today (Li and Li, 2023). In this sense, according to Zhang and Song (2003), the role of both rural and urban migration as a result of population discouragement is evident, generating a massive displacement to large cities. It also highlights the role of the dominant urban culture, attributed to basic inequities.

Conclusions and discussion

In conclusion, the objective of the study proposed at the beginning of this article was solved throughout the study, since it addressed the issue of Chinese immigration in Colombia and its impact on binational relations, specifically on social and cultural policy, through the review of the literature and the methodology used, which sought to understand the causes and consequences of Chinese migration in social, cultural and economic terms (Creutzfeldt, 2023).

Regarding the economic perspective of Chinese international migration, it was shown that Chinese migration has had economic effects in the receiving country, such as the increase in wages and the decrease in unemployment, where Chinese migration has generated social, economic and cultural dynamics in the places where it was established and that it was seen as opportunities from which they have managed to participate (Serrano and Eckhardt, 2023). However, Chinese migration had a limited impact on the economic level, because historically immigrants in the country did not have greater representativeness in the country, however, bilateral relations and diplomacy with the Chinese community have been maintained, generating opportunities in the creation of regional policies (Pérez, 2020). Therefore, foreign policy and economic and labor opportunities for local economic development and individual success of the migrant were highlighted, breaking with paradigms and stereotypes about the marginalization of jobs, as well as the entrepreneurial spirit in the receiving country.

On the other hand, as for the social perspective, it was concluded that the social impact of Chinese migrants in the Colombian territory contributed to the improvement of living conditions by solving particularities such as economic income, source of employment, entrepreneurship, etc., However, challenges were evidenced to determine the migration flow through foreign and

migration policy in the country, responding to security axes and cross-border control (Herrera, 2023), on the other hand, the pandemic was highlighted as an agent of change in behavior in mobility, social distancing through new social and labor dynamics as a consequence of the migration flow worldwide.

Finally, as for the cultural perspective, organizational alliances for the promotion of migrants in the country were registered, which was evident with the management of agencies and institutions that strengthened cultural celebrations, exposing challenges and opportunities for associations and trade to adapt the diaspora and integrate into multicultural areas through migration control that strengthened cross-border controls (Palma and Maubert, 2023). Thus, China's high economic growth led to a flow of intellectual migration where many families sent their children to receive education abroad that contributed to cultural diversity through knowledge and ideas for strengthening innovation and entrepreneurship in both nations (Li *et al.,* 2021).

In conclusion, the analysis of the impact of Chinese migration on the national territory allowed us to understand cultural, economic and social diversity. This analysis identified the landscape and the impact on development, both in traditions and customs, entrepreneurship and strengthening bilateral relations. All this was achieved through inclusive policies that promoted development in both countries, as Camargo (2021) points out. In fact, for Méndez and Gómez (2021), international migration promoted local development in both the countries of origin and destination through the articulation of states to the productive, educational, social and cultural system through controlled and solid migration policies and institutions that promote development and international cooperation to improve the living conditions of the migrant population and reduce inequalities between countries.

It is important to note that the main limitation of this research corresponded to the magnitude of the population and sample, since the number of participants was not expected from thematic professionals experts in trade and international business of Colombia. It is therefore suggested that future research address a comprehensive picture of the prospects for the impact of Chinese migration in the country. This will contribute to the analysis and development of migration policies based on the findings found.

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From migrancy to "migrancia": phenomenological approaches to the social process of the migration experience of the United States-Mexico migration camp

De "migrancy" a migrancia: aproximaciones fenomenológicas al proceso social de la experiencia de la migración del campo migratorio México-Estados Unidos

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Abstract

This article discusses the experience of migration through the concept of "migrancia", thus making it possible to articulate the complex and diffuse category of "experience" in migration analysis. Without a viable concept in Spanish to explicitly reference the experiential repertoire of migration, I propose a new interpretation of the English concept of "migrancy", through a reflexive conceptual deconstruction, revisited as "migrancia". To arrive at this, I discuss major phenomenological arguments and the implications of thinking and working from "experience" in migratory contexts in order to highlight the formative role of experiences in migratory processes. In this, I highlight the importance of "demigrantizing" migration analysis and its importance of articulating experience from a "third way", i.e., hetero-phenomenologically. Next, I address the importance of "thinking through the body", from feminist epistemic and methodological points of view, in order to corporealize the migratory analysis and thus revisit the concrete of "migrancy" and then introduce "migrancia" as a concept that encompasses the phenomenology, embodied, of migratory experiences. Taking the field of Mexico-US migration as a reference, I frame "migrancia" from a feminist phenomenological perspective that allows not only to return agency to migrant bodies, but to bring phenomenology to migration analysis. Finally, I argue that working with "migrancia" is fundamental to understanding migratory phenomena and promises to make a valuable contribution to the analysis and ways of describing and narrating migratory processes.

Keywords

De-migrantization, embodiment, experience, Mexico-United States, migrancia, migrancy, migratory analysis, phenomenology.

Resumen

Este artículo trabaja la experiencia de la migración bajo el concepto de migrancia, posibilitando así articular la compleja y difusa categoría de "la experiencia" en los análisis migratorios. Sin un concepto viable en español para referenciar explícitamente el repertorio experiencial de la migración, propongo una nueva interpretación del concepto inglés de "migrancy", a través de una deconstrucción reflexiva conceptual, revisitada como "migrancia". Para llegar a esto, discuto grandes argumentos fenomenológicos y las implicaciones de pensar y trabajar desde "la experiencia" en contextos migratorios para así resaltar el papel formativo que tiene las experiencias en los procesos migratorios. Para esto, resalto la importancia de "desmigrantizar" el análisis migratorio y su importancia de articular la experiencia desde una "tercera vía", es decir, heterofenomenológicamente. A continuación, abordo la importancia de "pensar a través del cuerpo", desde apuntes epistémicos y metodológicos feministas, para corporeizar el análisis migratorio y así revisitar el concreto de "migrancy" para entonces introducir "migrancia", como un concepto que abarca la fenomenología, corporeizada, de las experiencias migratorias. Tomando como referencia el campo de la migración México-Estados Unidos, enmarco "migrancia" desde una perspectiva fenomenológica feminista que permite no solamente devolver la agencia a los cuerpos migrantes, sino llevar la fenomenología al análisis migratorio. Por último, argumento que trabajar "migrancia" es fundamental para entender fenómenos migratorios y promete hacer una valiosa contribución al análisis y formas de describir y narrar los procesos migratorios.

Palabras clave

Análisis migratorio, corporeización, desmigrantización, experiencia, fenomenología, México-Estados Unidos, migrancia, *migrancy*.

Introduction

The experiences of the migration of (and from) Mexican migrants, are structuring and (re)structuring their notions of identity, by the "decisive" impact of the experiences themselves—the trauma, the "difficult", the "emotional"—that involves the translocation between spaces dominated by ideologies and political positions.[1] They are experiences that become "chapters" of the narratives of life, of one's biography; they are (part of) "life stories" that structure and enable (re)ontological configurations and ideologies (Bakhtin, 2000). There is "a lived distance [that] links me to the things that count and exist for me and links them to each other" as stated by Merleau-Ponty (1997),

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1   See Gómez (2018).

"the physical or geometric distance that exists between me and all things," As Sara Ahmed (2000) recalls:

> The experiences of migration—of not being in a place that one lived as one's home—are felt on the level of incarnation, the lived experience of inhabiting a particular space, a space that is neither inside nor outside of bodily space. (p. 92; my translation)

The interaction with the ways of being in the world generates values that structure the forms of interaction in and with the world, configuring ontologies, identities and ways of being (Bakhtin, 2000). As Handlin (1973) emphasized, "immigration altered America. But it also altered immigrants" (p. 4; my translation).

The lived experience of migration is a structuring experience (ontologically speaking). So how can we incorporate the experiential repertoire of experience into migration analysis? One way to do this is to bring, into Spanish, a reconstruction of the old English concept "migrancy". I call this "migrancia".

In order for us to reach this, I make a specific review of the literature that covers the migratory experience, intertwined with studies that employ and use "migrancy", in order to reveal its meaning, and recover its essence put in a term that does not yet exist in Spanish, which I propose as "migrancia". I start by raising the principles of phenomenology, to give some answers to the question of how does experience operate in migration analysis? Moreover, what does a migration phenomenology mean? Here I lean on the discussions that begin with the philosophical discussions of Martin Heidegger to demonstrate the social construction of reality. From this point on, I articulate the need to resort to other ways of thinking about migration analysis, an idea that finds encouragement with Janine Dahinden and her call to "demigrantize" migration analysis. Next, I address the ways of seeing what we see, from the ideas of the philosopher Daniel Dennett, who highlights that the interpretation of perception - as the basis of the work of scientific analysis and proper of migration studies, is given through a perception of perceived, i.e., from a "third way", to what he calls heterophenomenology. Then I bring these discussions to the body, as the enclosure from which emanates perception, sensations, and constructions of experiences. I argue that embodying the phenomenology of migration allows not only to recover the agency of the migrant and highlight his/her body, but also to identify that the experience is part of biographical narratives built through situated bodies, stories, remem-

bered and perceived. Subsequently, I locate this discussion from the situated territory - history, recovering Jacques Derrida's concept of ontopology. On these discussions, I build a conceptual unit that seeks to recover and refer to the phenomenology of the migratory experience. I call this, and define it, as migrancia. Finally, I conclude with some reflections on the ways of thinking about migration analysis, and the importance of articulating the experiences in migration analysis, specifically, the importance of working with migrancia in migration analyzes.

The phenomenology of migration experience

Experience, Heidegger says (1927/1997) is "being-in-the-world". *To be-in-the-world* is to be *between spaces*—a space *between* another space—in which experience is mediated by the subjectivity of the body—corporeality—and perspective—particularity. The experience, in this sense, is framed by the dialectic of otherness, relational and situated within an unfinished process of constant construction. The experience of *being-in-the-world* is mediated in relation to the other—the "non-I." The "lived experience" is the product of the dialectic between "experience" (*Erfahrung*) and "experience" (*Erlebnis*). Thus, the hermeneutic ascriptions to experience are found within historically forged and contextualized narratives and, of course, subjectivated (Føllesdal, 1991). The experience of migration is an experience lived, deposited and traversed in and by the body—symbolic, ontological, social—of the migrant. The experience of a lived experience is activated by the process of memory and its remembrance. Abril Trigo (2012) reiterates that the construction of memory, as an ontological positioning of the ways of being in the (biographical) temporalities from the present (the here-now), is what allows "the encounter of the present of the now [Jetztzeit] with the past of the *accumulated* experience *[Erfahrung] where the lived experience* [Erlebnis] occurs as duration" (pp. 26-27; original italics). In the words of Merleau-Ponty (1997), "for us to perceive things, we must live them" (p. 339).

The experience of the experience arises from the relationship with the duration "of the cultural-performative memory", i.e., the memory produced and product of the confluence with the horizons of social action (Trigo, 2012). It is from a dialectical relationship between the individual (as the first point of oscillation of the subjectivity) and the sensitive horizons of the territories—

both physical and symbolic (the other points of oscillation of the subjectivity)—that enables the production, circulation and the "memory" of memory (Jelin, 2012). In other words, the sources of memory, as well as the sources of lived experiences, are and emanate from the social (Trigo, 2012). Thus, the expression "make memory" makes sense, because memory does not exist on its own, but memory "is made". Memory is a product and a social process.

Concomitantly, lived experience is shaped by the relationship between space (as territory) and time (as history) that, consequently, shapes experience as a historical process attributed to the territorialization of space as "inhabited" and political space (Harvey, 2000). This semiotic and cybernetic contour, between the individual and his/her interactions, are constitutive in framing the conceptualizations of the connotations and meanings of the spacetimes that this occupies, transits and uses. The occupied and inhabited space is, therefore, the 'primary source' of the memory and builds the properties that nourish the narratives of experience, as properties of the "biographical space" (Arfuch, 2007).

Leonor Arfuch (2007) argues that the biographical space encompasses "the narration of stories and experiences, the capture of experiences and memories" (p. 84), therefore, the biographical space are the narratives that denote a sense to the individual that, in turn, structures agency, *expectations, ideations and, consequently, memory and remembrance.* Considering the Mexican deportee in a border area like Tijuana, the biographical space is in constant negotiation with the biopolitics of the border, and is part of the 'biopolitical metaphor'. The migrant, like every individual, is situated through his history, his biography and his "world" (Schutz, 1982).

Considering all the above, one way to carry out the methodological operationalization of the phenomenology of experience lies in rescuing "dominated" concepts and carrying out a work of demigrantizing the analysis of migration. One of these concepts is the English concept of "migrancy," which is mistakenly equated as "migration" in Spanish, but its denotation extended far beyond simply referring to something as obfuscating as "migration." At first glance, its contemporary use seems to indicate that "migrancy" is related to mobility in the migratory process, but this is an effect of having been irreflexively dragged through history (Smith, 2004). It is necessary, as Janine Dahinden (2016) argues, to demigrantize migration analysis. One of the questions, still unresolved, that runs through this whole discussion is how can we instrumentalize, analytically, the phenomenologically expres-

sed experience of migration? One way out of this methodological epistemic alley is to approach this question from the "third way" and think about it heterophenomenologically.

"Seeing" the migratory experience: heterophenomenology and the "third way"

Recognizing that communication is interpreted, doubly, as part of a "hermeneutic circle" where an evaluation of an observation on what is observed is made, it is useful to consider Daniel Dennett's heterophenomenological approach. Recalling discussions of feminist phenomenology, Dennet (1991) identifies that an observation of an observation requires taking a reflexive position echoing the feminist epistemological discussions of Donna Haraway (1988) on "situated knowledge".

In this regard, Daniel Dennett (1991, 2003; 2007) argues that the ways in which human beings construct narratives about who they are—biographical narratives that nurture and structure their *I*—are given through self-referenced discourses in relation to the "non-I," i.e., with everything external to the individual communally identifying as part of the "otherness." Every individual, therefore, develops dialectically positioned narratives with the experience of otherness, which encourages narrative properties that build the "body" of identity, the biographical territory of the individual; the biographical space. This narrative body-as-territory is part of what Leonor Arfuch has called the biographical space, which nurtures an identity cartography that guides, sustains, validates and gives meaning to human actions. Therefore, phenomenology is part of this biographical space, of this identity narrative and of this body cartography that defines the type and way of experiencing social reality. The phenomenology of experience, therefore, is not only a subjective expression and property, but is a social product and process. From these arguments, Daniel Dennett (2003) proposes to articulate a "heterophenomenological method", to recognize the plurality of experience and allow addressing subjectivities as situated "truths" that, in turn, allows them to be treated analytically as valid sources. In this sense, biographical narratives must be approached as situated knowledge, from an explanation of the observer's positionality on what is observed and consider what is said as a social fact (Atkinson, 1997).

Working a heterophenomenological method involves adopting an intentional, situated and reflective posture in which an epistemic subject is observed, with situated knowledge, invested with agency, beliefs and rationality, and his actions and narratives that he recalls about his experiences as part of a body-as-territory of his biographical space are interpreted as social facts. As Abril Trigo (2012) reminds us, "a proper negotiation and reconversion of subjectivity necessarily involves processing memories as instances imbricated dialectically to the present in duration, as lived experiences in practice" (p. 28).[2]

Phenomenology, like that which deals with the "phenomena" of reality, nourishes the essence of the identities that every individual assumes. In this sense, the 'I', argues Dennet, is the result of various narratives that are inscribed on the body and structure the way the body is positioned and placed in a social order (McCarthy, 2007). The incorporation of biographical narratives that are part of an identity unit, self-referenced, and from which one interprets, perceives and interacts with the world —the "I"— passes, Dennet (2003) tells us, through four articulations that are interposed in the binomial of the "I-not-I":

- self-conscious experiences;
- beliefs about these experiences;
- the "verbal judgments" that express those beliefs; and
- expressions of one kind or another. (Dennet, 2003, p. 21; my translation).

The heterophenomenological stance fully holds that reality is a social construct.[3] As Thompson (2000) says, "the heterophenomenological world is, after all, the world in which we live" (p. 214; my translation).

The heterophenomenologically expressed act of "being in the world" (Vattimo, 1987) is presented in the narratives that describe, express, feel and occupy the spaces of the social construction of reality (Thompson, 2000). The elements highlighted in the narratives demonstrate a prioritization of those that stand out most in their incidence in the biographical space: they are narrative stories that participate and are presented in the "life story" that

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2   Own translation.
3   See "Dennett and Constitution" in Thompson, 2007 (pp. 214–217).

we tell about ourselves, and "the world" (Sanford, 2006). These perceived elements constitute an identity notion that conditions the ways of experiencing the world—as performances and perceptions of and in what Berger and Luckmann (2001) have described as "symbolic universes" defined as those "bodies of theoretical tradition that integrate zones of different meaning and encompass the institutional order in a symbolic totality" (p. 124). Briefly, we can understand symbolic universes as the socially mediated and historically produced referential field that is part of what Dennet describes as "narrative centers of gravity." For example, Avtar Brah (2005) recalls that both identity and lived experience is the product of the hermeneutic and phenomenological dialectic between the individual and the social, between the private and the public, between and from the narratives that stand on the social mesh of experience (p. 172).

Narrative centers of gravity are those facts and stories that find affinity with the individual biographical space; they are stories, events, experiences and ideas that "gravitate" towards the idea of the identity of every individual, being attracted by its essence in expressing relevant components to the "history of the individual". In other words, narrative centers of gravity are those elements of social reality that take on importance in making sense of the history of who we are. Thus, the centers of gravity become sources for our Self, expressed in discourses and narratives that seek to explain our ways of being and being in the world. The centers of gravity are expressions of a "reflection" of a position assumed in the world, the result of a situated discursive internalization that allows us to access "models" of action, interaction and ways of being, and forms of the Self (Dennet, 1991). These are the speeches that "define" us; it is an expression of *habitus*, Bourdieu would say.

Likewise, every individual is a narrative composition. The biographical space, therefore, is established from the stories that are made: (a) of oneself, (b) from others; and (c) from the interpretations on (a) and (b) (see Figure 1). These narrative centers of gravity are configured in the double hermeneutics of the dialogic and dynamic relationship between the individual and "the world". It is the gaze, from and towards the individual, charged with values, senses, intentions and "history" that influences the composition of the "life story"—which is spun from and through the individual—of its "being". The look as sustenance and substrate of the biographical narrative is a political "space". As Le Breton (2006) recalls, "the gaze that is placed on the other is never indifferent" (p. 60).

Figure 1

*The three main narrative centers of gravity of the Self,
according to Daniel Dennet*
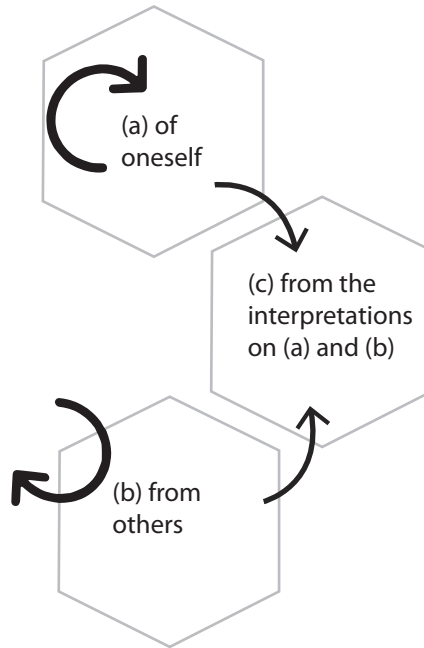
Note. Own elaboration based on McCarthy (2007).

Meaning, therefore, attributed to a lived experience is a corporeal thing, because it crosses the body and is "part" of the body (Ahmed, 2015). The body, thus, is the mapping of the reasons for the semiotic composition of lived experience (Ahmed, 2015) and becomes "a place" of memory (Nora, 2008). In his masterpiece on culture, Le Breton (2006) argues that the human being experiences the world "traversed and permanently changed by it" (p. 11), so the body becomes an extension of the "world"—becoming a *body-world*—where the body feels and experiences the "world." Le Breton (2006) emphasizes that what conditions the way the world feels is not the body, biologically constituted, but the body as culturally nuanced: the body as social, as society.

"Corporezing" the migratory experience: from *migrancy* to migrancia

Since its introduction in the early 1960s, the term *migrancy*—without conceptual equivalent in Spanish—has been used to describe something related to the migration process, being a rather murky concept due to its absence of conceptual specification. What, really, does "migrancy" mean?

"Migrancy" is a term that differs from "migration" even though its Spanish translation usually equates both terms as synonyms. A critical review of its uses shows that "migrancy" is not just a mimetic variation to allude to "migration" but something else.

One of the earliest uses of the term 'migrancy' appeared in the publication of the results of Philip Mayer's 1962 research, which presented results of his research into the migration of Xhosa tribesmen from the South African city of East London during the first half of the 20th century. The Xhosa are a tribe with a migratory tradition located mainly in the Eastern Cape of the southeastern region of the African continent. Throughout the 20th century, Xhosa were progressively incorporated into increasingly urban environments, entering new contexts and lifestyles. In search of understanding what happens when the Xhosa arrive in a city, with a time-spatial, cultural, political, economic and socially differentiated logic, Philip Mayer begins to describe the differences starting by identifying the existence of a double displacement in this movement: (i) one referring to the physically and geographically constituted space, and (ii) referring to the semiotic references that give meaning to the world.

In order to excel in the logic of a city, Mayer (1962) observes that Xhosas developed various strategies to give "meaning" to how, where and in what form they occupy the spaces of the city. The Xhosas in East London go through a reterritorialization of their identities —a reterritorialization of their biographical spaces— that seeks to move in an urban architecture and social organization that insists on positioning a "local" logic —urban, capitalist and "modern"— on the foreign —the strange, the otherness, the rural, the "traditional". In the words of Stephen Cairns (2003), "the figure of the "migrant" (…) undergoes a "reterritorialization" after a periodic deterritorialization" (p. 1; my translation).

It is from these mechanisms and expressions of spatio-temporal narratives of the social membership of migrants—located in and between the locality of origin and the locality of destination—that the term "migrancy" emerge. Mayer (1962) is clear in framing "migrancy" as referring to the subjective

particularities of facing interaction in plurilocality, taken as heterophenome-nological, i.e., as a "stable and intersubjectively reliable theoretical position" (Dennet, 1991; p. 81; my translation). Migrancy, then, represents the process of re- and de-territorialization of positionality and reflexivity attributed to "place creation events" (Jacobs, 2002). Entering distinct semiotic fields, the Xhosas experience a form of "clash of cultures" what Philip Mayer (1962) refers to as a "migrancy field". Migrancy, in the context of the Xhosa, refers to the "extra-urban" relationships and ties that migrants who are now in ur-ban environments maintain and persecute.

Re-focusing the concept of "migrancy" within the phenomenology approach of the migration experience is important because it recovers, conceptually, the phenomenological forms of the migration experience. Without a clear and defini-te equivalent in Spanish, I propose to use the term "migrancia" as its equivalent.

Migrancia concentrates the semantic value of the properties of the social process of migration and the expressions that emanate from and among mi-grants from the experience of migration. Philip Mayer's analysis suggests that migration is an indivisible aspect and property of the process and expe-rience of migration. Since Mayer's studies in the early 1960s, migration stu-dies have intermittently used the term "migrancy"—especially in research on African migration—but usually in a non-reflexive and loosely defined way, appearing to be just a creative equivalence to refer to migration. It would be within the framework of the "turn of mobility" (Glick Schiller and Sala-zar, 2013), almost three decades later, that a renewed interest arises in con-sidering, seriously, the implications, meanings and properties of migration, highlighting the work of Iain Chambers (1994).

In his discussion of the implication and meaning of the concept of "mi-grancy" published in the early 1990s, Iain Chambers traverses the concept of *migrancia* by the reflexive canon of feminist, postmodern, and postcolo-nial and deconstructionist theories in considering migration as an ontologi-cal displacement of one who "is perpetually obliged to settle into an end-less discussion between a scattered historical heritage and a heterogeneous present" (p. 6; my translation). With migrancia, the biopolitical structure of power relations becomes visible at the individual level (ethnic belonging, cultural values, gender practices, etc.), at the meso level (institutions) and at the macro level (the State and other supranational actors), making explicit the entangled relationship that affects and builds the migratory experience (Harney and Baldassar, 2007).

Migrancia, therefore, seeks to recover the migrant subject from the macroanalytic and structural enclosure, emphasizing the hermeneutics of subjective migratory phenomenology by addressing the "necessary complexity" of a lived experience crossed by a socially defined body (Carter, 1992). Andrew Smith (2004) argues that, currently, 'migration' appears as a *sui generis* concept to describe the condition of the contemporary human being, since "everyone seems to be a migrant in a certain sense" (p. 257; my translation). Migrancia becomes an omnipresent aspect of contemporary social reality, referring "not to fact, but to the condition of human life" (Smith, 2004, p. 257).

To speak of migrancia is to speak of a traveling process that reformulates the senses of subjective concepts such as "home" and structures the ways of perceiving and imagining the world, in structuring "landscapes" that configure the social perspective on itself and the "world". The critical and reflective stance on migrancia highlights and reveals the significance of the role of migration phenomenology in the structures of agency, reference and ontological positioning frameworks. Migrancia, therefore, seems to be as important as other structuring factors of social reality such as gender, ethnicity, and social class. Finnish sociologist Lena Näre (2013) argues this by saying that:

> Although the boundaries of migrancy are fluid and contingent, as a social category it has very real effects on people's lives. In fact, it can be argued that migrancy has become as important a social category as those classics of the modern era: gender, social class, 'race' and nationality. (p. 605)

Migrancia is part of a heterophenomenological view of migration, as it is the incorporation of "what that subject believes to be true about his own conscious experiences and the world as experienced by that subject—the heterophenomenological or subjective world, i.e., not the real world" (Drummond, 2006, p. 57; my translation). So how is migrancia defined? To define it, it is still necessary to discuss an additional aspect: its ontopological constitution.

"Placing" the Migration Experience: The Ontopology of Migrancia

Resuming the feminist concern to refocus the body as an epistemic source, as a territory, as a policy, technology, protest and discourse, Donna Haraway raises a discussion about the body as an embodied body through the

metaphor of the prosthesis, as a process that intervenes the body, making the body, therefore, cloaks itself with new meanings and allows to get out of the semiotic cage that has dominated the body throughout a history of the masculinized, heteronormative and imperialist social sciences (Mignolo, 2010; 2015).

By seeking a political and epistemological positioning of the body as "always a complex, contradictory, structured and structuring body" as opposed to "the view from above, from nowhere, from simplicity", Haraway advocates the necessary consideration of the subject's complexity—of his body—as of his gender attributes. It advocates a consideration of the *ontopological* property of migration.

An "ontopology", writes Derrida (1998), is "an axiomatic that inextricably links the ontological value of the present-being (*on*) to its *situation*, to the stable and presentable determination of a locality (the *topos* of the territory, of the ground, of the city, of the body in general)" (p. 96; italics of the original text.). Therefore, lived experience is a situated experience that acquires the ontopological character. We can think that the biographical space of migration is one mediated by an ontopological field.

Taking into account the epistemic and methodological premises presented here, and seeking to instrumentalize the concept of migrancia, I propose to define it as: *the social product (unfinished) of the social process of the experience of migration, heterophenomenologically expressed and ontopologically located.*

Thus, migrancia seeks to recover the migrant subject from the confinement of macro-analytical and structural analysis, emphasizing the hermeneutics of subjective and relational migratory phenomenology. Migrancia is one of the most outstanding heterophenomenological aspects of the social process of migration, enabling the recognition of the migrant agency, making visible its strategies, negotiations, ideations and interpretations that frame migratory contexts. Adding a migrancia approach to the analysis of migration phenomena helps to break the gap between the different scalar levels of analysis and adds a necessary dimension to the understanding of migration. Consequently, migrancia is a good concept to rescue and refer to the intersectional factors that, as a whole, are part of the essence of the migratory experience and "go" with the migrant. It is a concept, reminiscent of Gilles Deleuze (1995), essentially mobile.[4]

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4   In his own words, Giles Deleuze argues that "it's not enough to say concepts possess movement; you also have to construct intellectually mobile concepts" (p. 122).

Looking for migrancia: between the ontopological and heterophenomenological

Memory is a socially ontopologically situated and essentially heterophenomenological process. Therefore, memories are multiple and plural—they are essentially heterophenomenological expressions—because narratives about experiences are fostered in the disjunction of perception, socially composed and ordered, which are based on the situated gaze. The experience is invested with multiple memories that compete for the dominant narrative, traversed by the plurality of the story, feeding the biographical space and moving through narrative centers of gravity.

Memories foster degrees of perceptions—such as tones and accents placed on remembered narratives—that feed perceptions of self in front of self and self in front of otherness. The memory of the experiences of migration is, therefore, always memories that find their expressions in social relations and interactions—in the "world"[5]—and, therefore, are structured as *social facts*. Experience nourishes and is nourished by the ontopological aspect—i.e., a situated *topos*"[6]—of memory, in a hermeneutic dialogical expression, which lays, fundamentally, in the phenomenology of lived experience (of "being-in-the-world"). Memory, then, is a constitutive and intrinsically social element, but memory also resides in an individual, therefore memory is also individual.

The French philosopher and sociologist Maurice Halbwachs (1925/2004) argues that it is the social frameworks that engender the links that make memory architecture possible, as a mnemonic social architecture. Memory, like migration, is a social product made social.[7] To support these claims, Halbwachs demonstrates how the social framework engenders the formation of memory, presenting the context as a semiotic environment that defines experience and ways of remembering. Thus, individual memory is composed (and consequently) limited by the experiences (and scope) of the individual, as part of the extensions of the spaces (and times) that the individual occupies

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5 Understanding the "world" in phenomenological terms. Heidegger (1925/1997) argues that: to describe phenomenologically the "world" will mean: to show and fix in categorical concepts the *den* being between that is-there within the world. The entities within the world are things, natural things, and things "endowed with value." [...] The character of being of natural things, of substances, which creates everything else, is the substance. Chapter Three, 63 (p. 91).

6 For a brief tour on the constitution of the concept "topos", I recommend Portillo Fernández, J. (2016). Topoi and mental spaces. *Digital tones, 32*(0).

7 See Durkheim (1997, pp. 51-52).

in time and space. On the other hand, collective memory is limited by the set of references remembered from the points of interaction and is articulated by the ways of social interactions that are deposited in an object of greater communality (outside the individual) and part of the narrative references of the identity of the social group (Traverso, 2011). Collective memories are created as a process of unifying "stories" about lived experiences based on an "idea" of what happened that is spun into a "unified fabric". Jelin (2012) emphasizes this aspect by writing that:

> Memories are subjective and intersubjective processes, anchored in experiences, in material and symbolic "marks" and in institutional frameworks. This necessarily implies entering into the analysis of the dialectic between individual/subjectivity and society/belonging to cultural and institutional collectives. (p. 25)

Collective memory thus represents a generalized, devised and politicized image of "history" (Halbwachs, 1925/2004, pp. 54-55). To speak of memory, then, is always to speak of memories—both individual and collective—all in coexistence on time-spatial planes of differentiated reference and social relationship. Illustration 2 recovers the process of the social construction of memory, promoting individual memories that are structured in relation to three referents: (i) the collective, (ii) from the collective and (iii) with the collective.

The social process of memory necessarily recovers the emotional degree that accentuates memory. The emotions that go through and are part of the experiences lived regulate the presence and penetration of memories. The more emotional, the more inflated the event becomes, enlarged by its emotional character. These are the memoirs, usually associated with structuring events in the narrative biography of individuals—they are the "chapters" of life, as are often the events of loss, trauma, great joy, or relief (Halbwachs, 1925/2004). These structuring events in the remembered biography of every individual move into narratives loaded with feelings. They are emotional narratives. Memory, therefore, is *attached* to the emotional (Ahmed, 2015). Memory, like all experience and its experience and perception of it, is situated in a time-space. It is on this premise that Jean Duvignaud (2004) argues that the analysis of memory is, at its heart, an analysis of time—of a way of structuring and articulating time (Halbwachs, 1925/2004, p. 11). Time enables experience and frames the experience in a context, in a relationship with a social history. They are the social frameworks that enable the discursive ar-

ticulation of a social history, ontologically located. The social frameworks, therefore, allow the expression of the memory —situated, affective, historical and biographical— as a symbolic enclosure of the social and symbolic interaction experienced and internalized.

Illustration 2
The construction of situated memory - individual
memory and collective memory
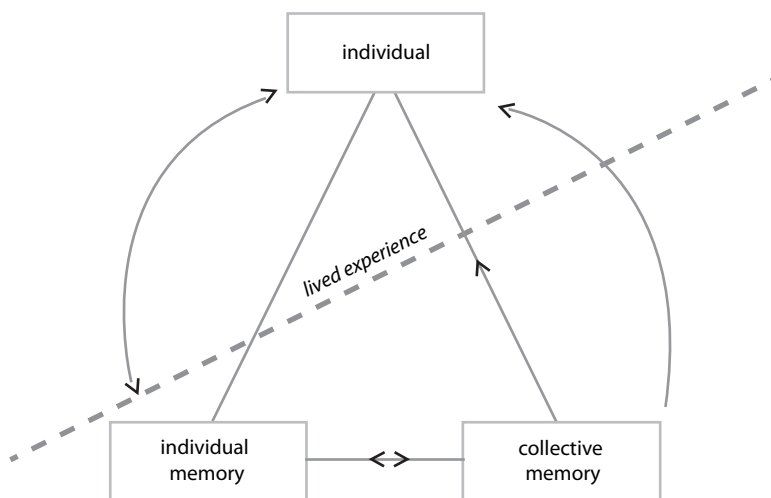
Note. Halbwachs adaptation (1925/2004).

Seeking to reflect on the "places" of memory, Pierre Nora (2008) conceives memory as the "life embodied" in social bodies that wander between memory and amnesia. Memory is, in the language of Maurice Halbwachs, expressions from social frameworks. Articulated on the premise of the "acceleration of history", Pierre Nora argues that the plural composition of memory (multisituated, emotional and reflective) builds a need (from the State or 'History') to position memory ontopologically, in social spaces that enable its continuity (as a memory).

Memory, as a social product of social frameworks, is part of the material social structure attached to the architecture of social organization. The

most iconic and recognizable "places of memory" are monuments, statues and other objects that seek, through their presence, not only to bring the past into the present, but to maintain a perspective of the past into the present. Thus, Nora argues that memories "have roots"—they are part of a territory (space-time)—and, consequently, memories inhabit a space (Nora, 2008).

The long-standing migration relationship between Mexico and the United States has built a supranational historical migration camp, forming a number of "places of memory." An undocumented migrant in the United States is constantly navigating places of memory, as part of the semiotic social topography of identity. Its condition of undocumentation makes it coexist under certain limitations that, in turn, amplifies the reflexivity of the membership deposited in practices of remembering that constitutes forms of making community.

These factors build experiences that find roots in the spaces of their remembrance, as heterophenomenological expression, being one of its most emblematic expressions the presence, image and perception of "La Frontera". The "traumatic" experiences of migrating, in an unauthorized way to the United States, cross the binational migration field as a social fact that has the effect, among others, of "tinting" memory by building a social "place" of memories. Migration, therefore, is an ontopological expression.

The spaces and places of the memory of undocumented Mexican migration are found in the extensions of the contact points of the social biographies of migrants who "escape history" (Nora, 2008, pp. 38-39). They are the Chicano murals of San Diego, the graffiti of Los Angeles, the Migrant Houses in Tijuana, the neighborhoods of New York, among many other "buildings" of memory as extensions of the historical memory of being and remembering. These expressions are ontopological representations of migrancia and the memory experience of "being" a type of migrant. The places of memory not only reside in the spaces of the dialectic of the subjective and objective, but also find encouragement in and between the topographical expressions "simple and ambiguous", as in their "natural and artificial" joints.

For example, Leo Chavez (1992) is clear in demonstrating how undocumented migrants working in the agricultural sector of Southern California find themselves in a "space" of significance for inhabiting two mutually exclusive spaces: (i) one relative to the sphere of the labor field and another (ii) relative to the non-labor social field. Thus, Leo Chavez observes how, on the one hand, when these undocumented Mexican migrant workers are in the labor camp, they are usually treated with appreciation. However, when they are dislocated to the

non-labor social field, experiences are more diverse and dispersed and they are often the subject of negative evaluations. The American anthropologist emphasizes that, in the non-labor social field, perceptions that they are "feared, even despised" and, in certain areas, seen as "dirty, plagued by diseases, amoral and capable of any desperate or disgusting act" (Chavez, 1992, p. viii; my translation) usually appear. The separation of these "spaces" by a symbolic border of the craft, separates emotions and perceptions from social fields. Spaces become *significant* (Halbwachs, 1925/2004) and *places of memory* (Nora, 2008).

Final considerations

Theorizing the epistemology and methodology of migration analysis is not just a capricious matter, but it is essential to maintain epistemic surveillance and to question reality from our various positions. The concepts, such as the concept of "migrancia" that I propose here, seek to recognize the experiential stories of experiencing migration. It seeks to show the ways of feeling migration, moving away from nuances that describe the migrant as a product of circumstances, barely reacting to its structure, without body, name, desires, or dreams. Considering Janine Dahinden's call to "demigranticize" migration analysis, it becomes important, as I have sought to demonstrate here, to recover voices from other disciplines, which allow us to "see" it in other ways. This work is, at the same time, a product of incorporating an ontopological sensitivity, as well as a heterophenomenological reflexivity.

The conditions derived from the confluences of factors such as: (a) being a migrant, (b) undocumented, (c) Mexican, (d) male and (e) adult—prevalent characteristics of the Chávez study group (1992)—are positioned as the valences of being and belonging to the social field configuring the essence of the *migrancia* of these migrants. "Their goals"—of these undocumented migrants in the United States— as Chavez describes, "is to survive, not to become rich or happy" (Chavez, 1992, p. ix). Memory that resides in the body builds identity in the same way that identity makes up memory.

The experiences — *lived*— of migration are deposited in a memorial architecture that feeds the biographical, cultural, political and social narratives of the subject and structures the ways of being in the world: *being in the world is remembering in the world*. The lived experience is part of the performativity of interaction and part of "being in the world" and incorporated

as the indivisible property of any individual. In a way, *we are by our experiences*. Therefore, lived experience cannot be analyzed as an isolated part, but is part of an interrelated configuration of a whole. It is only by the whole that the "impact" of the lived experience can be discovered. The meaning attributed to a lived experience is something bodily; that goes through the body, and is "part" of the body. As an ontopological expression, migrancia —as an experience of migration— is located "with roots" in the space of the body; in its expression of "body-world".

The body, therefore, is part of the cartography of the expressions that structure and guide the lived experience. As a substantive point, Russell Ferguson (1990) asserted, more than three decades ago, that "whiteness, masculinity, or heterosexuality can no longer be taken as the omnipresent paradigm, simultaneously center and limit" (p. 10; my translation) in the social sciences and this applies to the studies of migration. It must be remembered, reflexively, critically and analytically, that narratives are not absent from values; all narratives are political (from Fina, 2017). Consequently, the body is also political, therefore, what we say matters and, as we say it, perhaps even more so.

Therefore, the analysis of migration becomes feasible and viable provided that an intersectional perspective is adopted from feminist phenomenology, which makes it possible to articulate the experience of migration through at least three major social dimensions: ethnicity, class and gender, all structuring components of the ways of experiencing reality and consequently, incisive in investigating the ways in which migrants live the experience of migration. Migrancia, understood as "the social product (unfinished) of the social process of the migratory experience, heterophenomenologically expressed and ontopologically located" recovers the subject, makes the body visible and returns meaning to the migrant. Their experiences matter; how we tell these experiences matter. Migrancia matters.

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Challenges to the integration of young Muslims in Europe and Spain: strategies and tactics of radical Islamist groups

Desafíos a la integración de jóvenes musulmanes en Europa y España: estrategias y tácticas de grupos radicales islamistas

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Abstract

The study exposes the strategies and tactics of radical Islamism in Europe and Spain to attract and radicalize young Muslims with a religious, media and propagandistic content from Al Qaeda, Daesh or other related organizations that share the culture of jihad; chain of subjects, actions, messages and propaganda to participate in an ideologization process to use violence in the jihad against the West, social and political way of life, and interfere in the democratic, liberal and legal process in Europe.

This qualitative research achieves approximations of individual characteristics and family, social, familiar and economic conditioning factors of the vulnerable groups to the jihadist message, highlighting ignorance or dissolution of their cultural, religious and ritual traditions; absence or weak individual, family or community identity, experience of social, educational, labor or political discrimination and economic inequality; facilitating the radicalization process until their participation in acts of violence.

This research was carried out in the city councils of Fuenlabrada and Leganés, Comunidad de Madrid and Reus and L' Hospitalet de Llobregat, Province of Tarragona, Comunidad de Cataluña, Spain; through specialized bibliography, interviews to academic, police and intelligence experts, public attention and social services workers, the contribution of Muslim community representatives; who observe the emergence of these elements and the need to improve strategies and preventive actions in Europe, reducing its impact on the vulnerable population.

Keywords

Ideology, recruitment, indoctrination, radicalization, terrorism jihadism, religion, State.

Resumen

El estudio expone las estrategias y tácticas del islamismo radical en Europa y España, para captar y radicalizar a jóvenes musulmanes de un contenido religioso, mediático, propagandístico; desde Al Qaeda, Daesh u otras organizaciones afines que comparten la cultura de la yihad; cadena de sujetos, actuaciones, mensajes y propaganda para participar en un proceso de ideologización, para hacer uso de la violencia en la yihad contra Occidente, forma de vida, social y política; e interferir en el proceso democrático, liberal y de derecho en Europa.

Esta investigación cualitativa logra aproximaciones de características individuales y condicionantes familiares, sociales, familiares y económicas de los grupos vulnerables al mensaje yihadista; destacándose ignorancia o disolución de sus tradiciones culturales, religiosas y ritualidad; ausencia o débil identidad individual, familiar o comunitario, experiencia de discriminación social, educativa, laboral o política e inequidad económica; facilitando el proceso de radicalización hasta su participación en actos de violencia indiscriminada.

Esta investigación se realizó en los ayuntamientos de Fuenlabrada y Leganés, Comunidad de Madrid y Reus y L' Hospitalet de Llobregat, Provincia de Tarragona, Comunidad de Cataluña, España; a través de bibliografía especializada, entrevistas a expertos académicos, policiales e inteligencia, trabajadores en atención pública y servicios sociales, el aporte de representantes comunitarios musulmanes; quienes hacen emerger estos elementos y necesidad de mejorar estrategias y actuaciones preventivas en Europa, reduciendo su impacto en la población vulnerable.

Palabras clave

Ideología, captación, adoctrinamiento, radicalización, terrorismo, yihadismo, religión, Estado.

Introduction

The European reconstruction of institutional, political and social infrastructure after the "great war", the parenthesis of "interwar", in which democracy is attacked and disrupted with the emergence of populism, fascism, communism; in its intention to occupy the Western liberal democracies, summoning Europe to a new conflict on the continent and world, with all its consequences, allowing the defeat of fascism; behind it Europe, ruined, divided and deprived population, and isolated between two powers such as the United States of America and the former Soviet Union, which increase the ideolo-

gical and geographical division, a confrontation between Western democracy and Eastern communism. Thus we adopt new terms: "cold war", which lasts for another 35 years until the fall of the eastern bloc [for some today], bringing with it a new integration process, consolidated with the creation and construction of the European Economic Community (Tratado de Roma, 1957), opening the way to economic and political integration to a single and strengthened Europe, bringing a "rapid, drastic and apparently irreversible secularization process" (Casanova, 2012, p. 334), then the European Union, growing with new accessions, deepening of Western liberal democracy, respect for the fundamental rights and freedoms of the individual, promoting mutual trust, welfare, security, justice and citizen participation.

After the chaos and wars, the reconstruction required important internal or external migratory flows from sub-Saharan countries, the Middle East contributing to this human current towards Europe in recovery; individuals and families of political regimes of null or precarious forms of democracy, with little participation and inclusion: cheap labor, contrary to what was expected give way to a permanent stay, aligned in their new destinies, grateful, subdued, invisible, assimilated individuals and families (Toledo 2021, pp. 9-13).

From this new migration, the migrant carries his cultural backpack: tradition, religion and ritual, resorting to it to give continuity to his life, and sometimes collides and frictions with values and ideas accepted and lived in the reception space, opening scenarios of conflicts between native and migrants; that poorly accused give form to xenophobia, rejecting his presence and stay, violence and radicality of the autochthonous in protection to his identity, community and culture, traditions, local economy and even natural resources (Lacomba, 2013, s.p.).

To this reality, the migrant adapts traditions, rituality, individual and community relations to small spaces outside the view of the host community, so that homes and other spaces are transformed into improvised meeting places, cultural symbolism of belonging, language and customs; expressing their decision of help and permanence. For Durkheim (1993), the adaptation of rituality to this social or geographical space is necessary and bearable to "renew certain mental states" (p. 38), promoting adaptation to "practicing the rites that are proper to it", forging unity and solidarity in these recognizable "identical practices" (p. 87), cultural, religious, ritual and/or political, contradictory to the sociocultural reality in the arriving spaces. For Touraine (in Kepel, 1995, p. 107) we identify "religion with tradition and seculariza-

tion with modernity", explaining the eviction from political power, thus any religious visualization and expression in the social sphere challenges this secularization and renewed paradigms, "Europe is intimately linked to a project of cultural modernity that considered religion […] as a vestige of past times" (Bericat, 2008, s.p.), interviewing contempt for all forms of religion, rituality and expressiveness, retracting any action that symbolizes this retrograde traditional order (Touraine en Kepel, 1991, p. 45), Casanova (2012) highlights the idea: "the general secularization of Europe is an undeniable social fact" (p. 360).

The European reconstruction: democratic, modern; States, Institutions and society in general, carry new paradigms: distancing between institutionality and religion, moving it from the spheres of power to the individual, according to Casanova (2012), prior to the Treaty of Rome (1957) in detriment of the "institutional Christian religion in Europe" (p. 334), dissipating its transcendence, monopoly, social and political influence.

The effort of political and institutional modernization, collides with other realities; Mediterranean countries, mostly Islamic, exhibit a resurgence of expressiveness and rituality, capturing the political and daily life of its inhabitants; Sarfati (in Peña and Llera, 2013, p.139) explains that "religion experiences a revival on a global scale", vivid in each migrant arriving in Europe, acquiring a "growing public and political identity mobilization, "as a consequence of the intensification of world migratory flows […] or the rise of political Islam", contrary to the current of disdain for religions in Europe.

Ideology, Islamism, and Religious Fundamentalism in Islam

The 1960s expressed the resurgence and strengthening of Islamist movements, according to Borrelli and Saborido (2007, p. 74), the "irruption of Islamist movements in the Arab-Muslim political scene". Ideologues such as Sayyid Qotb, Abul A'la Mawdudi and Ruholla Khomeini claim a political Islam in search of a "cultural, social and fundamentally political identity, against secular nationalist values" (p. 74), until the "establishment of an Islamic state that would carry out the Islamization of society in its entirety [....] 'from above' and then expand throughout the Muslim" (p 74), prior to Western interference.

The great mesh of Islamist groups that represent diverse currents, their differential, lies in the ways in which they intend to carry out the re-Islamization in their communities. To this end, its ideologues have redefined and refocused Islam not only as a religious body but they claim that Islamic society does not only constitute "a gathering of believers", in principle it is "the nature [and source] of political power" in Muslim culture and tradition, as Roy (1996, p. 26) and Borrelli and Saborido say (2007, pp. 4-7). On the one hand, "revolutionaries" defend that this Islamization must come from state power, control or seize the power of the state and promote transformations; another "reformist or moderate", from the social base that leads to an Islamic State, which achieves changes from above, manifested in the political-party activities of 'Muslim Brotherhood' (Egypt). According to Kepel (1991) "it outlines a new historical sequence in which reislamization is carried out above all 'from below', with the impregnation of civil society by the network of mosques and pietist associations" (p. 44), when "the reislamization movements defeated with all their violent confrontations the State" (p. 52).

Added to this current in political Islam is religious fundamentalism, for whom religion is the foundation of individual and community identity. Giddens (2002, p. 705) describes "the approach taken by religious groups that demand the literal application of fundamental texts and believe that the doctrines that emerge from such readings should be applied to all aspects of social, economic and political life": return to religious sources, purify their different currents and promote the literality of the Quran, transverse to other texts such as Torah or the Bible. Religious fundamentalism is a source of primitive ideas: infallible and perfect from God, authority to which no other can invoke and impose itself (Étienne, 1996, pp. 56-59). For Roy (1996, p. 19) this fundamentalism, like radicalism, "designates, in Islam and in general, the eagerness to return and conform to the founding texts of religion", and tries to "ignore all the contributions of history, philosophy and tradition of men".

In turn, radical Islamism is defined as the reposition of religion in the political or the political in the religious, "by its re-reading […] of the history of East and West" (Étienne, 1996, p. 16), especially in the current world order: its religion, culture and community are repressed and displaced, self-perceived pawns of the contemporary world reordering. For this reason, this radical Islamism seeks to recover its sources, spaces and forms of community life, trying to return to the roots of political Islam, which Étienne externalizes as the reconstruction of 'give al-Islam' and discursive "return to the

Islamic precepts of behavior and organization that contain in themselves the solution of contemporary problems" (p. 165).

Islamic religious fundamentalism and political role in its spheres of influence derives from the non-existent division between the spiritual and political, manifested since the origins of Islam: the prophet and founder possesses the duality of religious leader, attains political and military power in life (Bruce, 2003, p. 61). Faced with this, the Umma does not dispense with or need to unfold, which the West recognizes as secular powers, so that its community is referred to as a religious collective and political community at the same time and is unable to recognize itself divided in these areas (Casanova, 2012, p. 94).

This duality is far from the current Catholic and Roman religion, displaced and disempowered; in Islamic culture and tradition, divine omnipresence is manifest in private, public and political life, which Elorza (2002) highlights:

> The only existing law, religious (sharia), is at the same time the civil law of divine origin, which governs all manifestations of human life, both in its individual and social and political aspect [...] the essential thing is that the community adjusts its behavior, and makes the behavior of its members to be adjusted to the provisions of the Creator, thus acquiring an indelible sign of identity. (p. 32)

On the significance of sharia for the Umma, Laroui (2001) argues:

> The šarĭ'a aims to raise man, public and private, to the level of the ethical ideal proposed by the Prophet [...] the regulations base the legality of the State, but the State, if it seeks the title of caliphate, must also look towards the ethical ideal given by the Prophet. (p. 35)

In these precepts, each ruler is a transient recipient of the power delegated by God for his function of governing, and it is the duty of the Umma to obey, to fulfill the tasks set by Allah to his Messenger, depositary of divine power, described in the verse of the emirs (Quran, 9, 71): "O ye who believe! Obey Allah, obey the Envoy and those who hold authority among you" (Elorza, 2002, p. 36).

This religious, political and military conjunction formulates a structuring of the State distant from that adopted by the West, a contradiction that Casanova (2012) exhibits in the Turkish paradox: "a Muslim country more secularist even than the European countries [...] a supposedly secular Europe

is still too Christian when the possibility of imagining a Muslim country as part of the European community approaches" (p. 180), transcendent in the last decade in Europe, witness to the re-Islamizing political process, favoring the Islamist strengthening as a religious and political current in the State; it proves the process of European integration that claims its "right to be, or its right to become, a country fully economically and politically, while it configures his model of Muslim cultural modernity" (p. 290).

Among Islamists more radicalized in their task of erecting their State: the political and religious indissolubility, infallibility of the Quran and Hadiths, sharia as a fundamental law, irrefutable behavior for rulers and ruled, another feature in these fundamentalists, interpret and reinterpret the texts using the past, pure and irrefutable to crystallize the political and religious project today, which brings legitimacy to its religious, political and social objectives, to restore the greatness of Islam from the spiritual and temporal, reIslamicize Muslim society, expand beyond its current borders, topple the current political structures of the States, purification of Islam (Aznar, 2012, pp. 29-31), not abandoning violence as a self-granted prerogative, which Tamayo-Acosta (2009) explains: they are defenders of the 'give al-Islam' or "house of Islam where Muslims rule under Islamic law" (p.169), contrast of the 'give al-hard', territory not subject to Muslim norms, to be conquered and dominated; alleges that in the Quran it is expressed that the war will be over when Muslims triumph over the world, "over non-believers" (p. 169).

For prominent radicalized ideologues, the West and non-Islamic societies, we remain in a "state of religious ignorance that I called yahilliyya" (Borrelli and Saborido, 2007, p. 75), in defiance of the one God Allah, to whom submission and obedience are due, they fight an "Islamic rupture (uzla or mufasada)" to rebuild the "religious order (Din)" (p. 75), reinstate Allah on earth (caliphate) and defeat this "unloyal man" with jihad (p. 75), illustrated with Aristegui (2004) in conversation with the mustegui Umayyad Mosques official photo, Damascus (Syria): "Do not worry about yourself. It will take more or less time, but we will end up liberating all Al-Andalus from Western corruption, decay and oppression" (p. 147), a fraction of the fundamentalist and radicalized message, turned into a cause.

The use of warrior slogans from the Quran justifies the warmongering path cemented through the centuries: "…Community as such must always continue its 'effort' to continue to reign and extend on the earth 'the rights of Allah and of men'" (Aristegui, 2004, p. 165), amalgamating historical and

recent events, political, economic and armed conflicts, able to categorize its space and environment 'us against them', recreating the enemy in 'far / near' categories. This conflicting categorization, 'the West attacks us', 'destroying Islam', 'liberating all Al-Andalus', becomes necessary to entrench the narrative of the overthrow of Muslim society and culture. For Kepel (1995, p. 179) it is exemplified in the Islamist movements of the 80's, "it developed in Algeria as the rejection of a certain political, social and moral order, in the plane of identity, as the affirmation of community belonging to Islam". Thus, Islamist elites forge synergies to entrench the narrative among disillusioned young people until they become radicalized, legitimize the use of violence and defeat the West, reunify the Umma, and establish the universal caliphate.

Interested in these ideologized currents, interpretations and reinterpretations for jihad (struggle for common cause) contained in the revelations of the Quran part of the faith:

> Abû Huraira related that the Prophet (B and P) said: 'God promised the person who fights for His cause, only by faith in Him and His Messengers, to reward him with goods or spoils or to introduce him into Paradise (if he dies). […] I would like to be killed for the cause of God, then rise to be dead and then rise to be dead again.' Hadith Sahîd Al-Bukhari.

For Tamayo-Acosta (2009) 'jihad' is mentioned "thirty-five times in the Quran, most of them followed by the formula 'on the path of the Lord'" (p. 170), connotation of "effort against what is reproved, [...] effort to overcome difficulties" and developed in twenty-two other religious texts of Islam. It refers to "effort or overcoming in one's own and collective [...] on ten occasions, war, but defensive, never offensive" (pp. 170-171), self-defense and strengthening of the individual in the face of the challenges of life; reinterpreted and remodeled, according to Morabia (in Elorza, 2002) to "'holy war' or 'fight for the triumph of faith'", granting them "triple value, warrior, ideological and ethical-social" (p. 40) that radicalized fundamentalists justify in their violence against Shia and minority currents in Islam (near enemy) or against the West, Americans, allies and complicit Muslims (distant enemies), that ideologues are kept to redefine and manipulate.

These redefinitions and categorizations are felt by minority groups who "feel somewhat outraged by the continuing bloodshed [...] and the persistent idea that the West is waging an assault on Islam" (Cano, 2010, p. 78) to destroy their culture, society and religion; drawing concepts and messages for

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"the political instrumentalization of the Muslim creed" (p. 24), and Bruce (2003, pp. 31-32). Despite containing a religious connotation, fundamentalist ideology legitimizes the use of violence to impose its vision, regardless of the tradition, culture, ethnicity or religion of those subjected, hence fatwas condemning one or the other to death.

For Roy (2002), violence: "far from representing a religious community, from which they have been marginalized, or a traditional culture, from which they know nothing and which they reject, these new militants show a rupture followed by an individual re-Islamization, in which they build 'their' own Islam" (p. 26), where "neo-fundamentalists" (p. 26) promote the recruitment of followers, groups or "categories product of the modernization of Muslim societies [...] urban and schooled youth", who coexist "declassified [sic]", excluded from social benefits and political participation, subjected to their cultural, economic, family corruption (Roy, 1996, pp. 6–47).

This Western urban youth in predominantly Muslim spaces, that Islamists intervene for "the Islamization of this modernity" (p. 47), neo-fundamentalists sustained in a discourse that instrumentalizes Islam, a risk for the "re-Islamization of Muslim communities emigrated to the West [...] with a relaxed religious practice" (pp. 73-78), inciting them to distance themselves from corruption in the give al-hard, distrust Muslim looseness, create spaces of trust until achieving an unbalanced critical mass in society and "obtain concessions from the state" (Roy, 1996, p. 80), achieve changes towards the peak of power, defeating the secular modern state. He denies any form of religious expressiveness.

Another way, based on a Salafist and bellicose ideology, "combatant" interpretation of jihad, by believing, making believe and deepening that Islam is attacked for its extermination, holding the West and collaborating Muslims responsible, valid at any time, place and objective (Torres, 2009, pp. 112-113). A warlike worldview of aleyas, Medina stage, of "warrior slogans [...] departing from the warmongering path of Islam" (Elorza, 2002, p. 40), surahs such as "Cursed will be wherever they are, they will be picked up and killed mercilessly" (Quran, 33, 61), matured through the centuries in a "bundle of integrism" (p. 40) that becomes from the assimilation of religious and historical facts: the prophet fights against the unloyal; then, in the eleventh and thirteenth centuries, the expulsion of the crusaders is fought; now a crusade invades the sacred land of Islam. Therefore the asymmetric or terrorist stra-

tegy is not such, but an act of self-defense against the growing imperialism of the West (p. 41).

Engaging, radicalizing, and islamist terrorism

The actions carried out by these Islamist, fundamentalist and radical groups, radicalization that for Rabasa is "the process of adopting an extremist belief system, including the willingness to use, support or facilitate violence as a method to effect social change" (Rabasa *et al.,* 2010, p. 1), use new technologies; thus, the ideological message, as referred by the European Council, spreads underground and beyond any control throughout the world, basically the fight against a common adversary represented in the West and citizens, USA, Britain and Israel; geographical, cultural and political unit identified with democracy (Azurmendi, 2002, s.p.), "good Muslim" to be in jihad against the "unloyal", enemies of the Koran; extended to every "not innocent" Western citizen, enemy of religion, must sacrifice their blood and patrimony in actions against them (Cano, 2010, p. 25).

According to Del Águila (2008) for fundamentalists their speech is a weapon, and results—death and destruction—a duty; for De la Corte (in Del Águila, 2008), is a "cosmic struggle until the end of time" (p. 83) reinterpreted from "the indiscriminate massacres in religious terms and […] of its lethal and suicidal character as 'proof' of Allah's blessing" (p. 83, own translation), contextualized to the current historical moment: the siege of Palestine by Israel, the late stay on Iraqi soil of the international peacekeepers and even the occupation of Al-Andaluz; thus Berner (2006) explains: "I am one of the worshipers of Allah. I worship Allah, which includes carrying Jihad, to lift up the word of Allah and to drive Americans out of Muslim land" (p. 40).

These adaptations, a constant in the organizational dynamics of Al Qaeda and networks, according to Alvarado (2010) "represent a confederation of entities that share the same jihad culture, characterized by a tribalist [sic], absolutist and messianic world view" (p. 40), which changes with the invasion of Afghanistan by American troops, cutting off its leaders, destruction and expulsion from its bases and territorial sanctuary decimating a first generation of jihadists. This decimated Al Qaeda mutates into an immaterial entity, idea or concept of struggle, incorporated into the minds and hearts of new generations of jihadists, a broad umbrella that is protective, globalized and absolute.

This mutation of Al Qaeda, according to Cano (2010) brings this Jihad closer to "young Muslims belonging to the second and third generation of immigrants residing in Europe" (p. 77), born, raised, educated and socialized; European citizens, for whom Bin Laden is "figure of inspiration" (p. 38) popular, almost romantic in vulnerable social strata, peripheral neighborhoods of European cities, amalgamating 'rigorous' ideological elements of a fundamentalist Islam of Salafist style, and through this, violent jihad, as declared by Bin Laden on September 28, 2001, days after the attacks in New York, as mentioned in Berner (2006)

> Jihad is the sixth undeclared pillar of Islamism. Al Qaeda wants to keep Jihad alive and active and make it part of the daily lives of Muslims. […] We are in favor of armed Jihad against those unloyal governments that kill innocent Muslim men, women and children just for being Muslims. (p. 147)

For Schneckener (Cano, 2010, p. 20), in this act converge transformative elements without precedent in history, imposing a radical Islamist vision, mainly its destructive dimension; impact on human lives and political, economic, media and propaganda; its operation and planning, scope and implementation; international political dimension when attacking the United States revealing its weaknesses. In addition to this black record, Madrid on March 11, 2004 (11M) and London on June 7, 2005 (7J) took advantage of the network to deepen ideological objectives and propaganda, catalyzing the ambitions of the Muslim people, by mobilizing and capturing for their jihad. Madrid, the first European city to suffer an attack by Al Qaeda, not casual in the recovery of the places of Islam; Attack against the Kingdom of Spain, taken and expropriated from the Umma and occupied by the Catholic Monarchs in the fifteenth century, is part of the itinerary to reinstate the universal Caliphate and "Al Andalus" is essential, rescue it from its occupants "Spanish crusaders", according to Torres (2014), responsible for spreading the idea that Spain is built on the "plunder and occupation of a territory that belongs to Islam and its people" (p. 344), which forces them to expel with jihad.

Another strategic guideline provided by ideologues such as Sayid Qutb to enshrine this jihad: the struggle against governments of countries in the Middle East: fictitious, Westernized and geographically delimited, ignoring the reality of the Muslim people to weaken the indivisible and irreplaceable Umma, every leadership and authority in these false countries emanates not from the will of Allah, but from the profane power of the people in the form

of more or less democratic elections, with challenging laws that contravene Allah, without divine legitimization. False states to be eliminated to stop being obstacles in the reunification of the Umma; here these groups:

> They have an inexcusable duty to resort to jihad, with so much more intensity the greater, the threat [...] every effort must be made to destroy the power of the enemies of religion, to wipe out their forces and to secure the roots of religion. (Elorza 2002, p. 157)

In this scenario, the Mujahideen are the front line of this war, rewarded according to the Qur'anic quote: "Let those who change their lives here for the other to fight for Allah! Whoever, fighting for Allah, is killed or victorious, we will give a magnificent reward" (Quran: 4,74). This war, which includes terrorist violence in Europe, is part of the fight against the West, governments and citizens; a blow to European public opinion, aggravating the fear of terrorism against the civilian population (Cano, 2010, p. 33), a threat to the security of the State and Spanish institutions, Al-Andalus territory to be recovered. Thus, Madrid, London, Paris; form the black list of violence, causing serious losses of human, social and material lives, with emotional, psychological, political and economic consequences on victims, families and the European group.

This serious social, political, religious and security conflict, the institutions and civil society, provokes a growing concern, mobilization and effort to restore the trust, security and tranquility of citizens. In return, assuming greater restrictive measures, there is tight international control that manages to weaken and almost suppress its terrorist media presence. However, cornering and encircling Al Qaeda left room for the emergence of a group that continues its jihadist ideology: DAESH (acronym for 'al Dawla al Islamiya fi al Iraq Sham'), popularized as E.I. (Islamic State), supporter and continuator of jihad against the West (Fundéu, 2014, s.p.).

The retreat of Al Qaeda in Europe and empowerment of DAESH, left space to act and recruit young people newly arrived or descendants of previous Muslim migrations; born, raised and educated in Europe, with language skills, socialized in Western culture, access and management of technological and communication resources; typology that emerges after each police action and in Courts of Justice in Spain and Europe, dedicated to recruit Muslim young men and women (Toledo, 2021, pp 11-12).

Europe and Spain, after the acts of jihadist Islamist terrorist violence, from 11M onwards, has updated the punitive rules, that is how all the actions that these groups develop, to date, has a criminal legislative framework, as well as the different behaviors that promote, protect or encourage the use of violence, so there are punishable behaviors of criminal relevance, as well as the criminalization of the glorification of terrorism (art. 578 CP), dissemination of terrorist propaganda (art. 579 CP), passive indoctrination (art. 575.1 CP), self-indoctrination behaviors (art. 575.2 CP), through the Internet, incitement to terrorist violence through the Internet (art. 579.2 CP) or its own glorification of terrorism (art. 578 CP), crimes of more gravity such as collaboration with terrorist organizations (art. 577.1 CP), active indoctrination activities (art. 577.2 CP) or transfer to countries such as Syria or Iraq (art. 575.3 CP) (Cano and Castro, 2018, pp. 14-15), criminally punishable list for the social control of these activities in Spain.

Method: design and methodological research strategies

This research initiates with a literature review, i.e.: to collect literature of reports, research and specialized work, exploration with key words: jihad, Islam, Muslim, terrorism, Al Qaeda, radicalization, ideologization and propaganda, "obligatory step […] [to] get acquainted with the 'state-of-the-art" (Valles, 1997, p. 49), incorporating the knowledge and experiences accumulated from different areas of knowledge. This approach, useful to develop a conceptual framework, operationalize the theoretical concepts in the form of 'Table of Contents' (CualSoft, 2012, s.p.), as for Valles (2004), "has to translate the research questions (objectives, hypotheses, etc.) into questions or conversation with greater or lesser standardization and structuring" (p. 59), first approximations that advance to the construction of the "research questions […] or theory" and then "interview questions" (p. 59), with a description "of terrain" or "explanatory" (p. 59), draft questionnaire that presumably covers all areas.

The control, observation and suggestions to the questionnaire were presented to the "expert or peer judgment" (Pedrosa *et al.,* 2014, p.7), who "evaluate the different items according to their relevance and representativeness" (p.7), assigning not only quantitative assessments, but contributions and analysis of the instrument, recommendations, qualities, absences or unforeseen events.

This methodology uses proposals from the "Glaser and Strauss Grounded Theory" (Trinidad *et al.,* 2006), aiming to provide answers to social research problems; "an approach that proposes a method of analysis, the use of a set of systematically applied techniques" (p. 16), which: "a) is generated and emerges from the field; b) is grounded in the substantive area, and c) develops inductively" (p. 20), allowing the 'emergence' of categories from the data, alternative to the hypothetical-deductive approach in social research (p. 2).

Valles (1997) considers for the success of qualitative research three methodological elements of social research: documentation, observation and conversation (p. 119).

a. Documentary research strategy and literary review
As it is a recent and little studied topic, the review of bibliographical information is timeless, of social impact from academic, national and international institutions and recognized organizations. Thus, their search in specialized libraries, add servers and search engines on the Internet, databases, online catalogs of books, scientific and specialized journals, articles, collective works; audiovisual and photographic archives in the RS, among others. Thus, specialized libraries were used, housed at the Complutense University of Madrid -Faculties of Political Science and Sociology, Law, Social Services, Psychology, Economics and Business and Philology-; of the Spanish Agency for International Development Cooperation (Cisde), Alfonso X University, Central Headquarters in Madrid, Pablo de Olavide University, Islamic Library (Aecid), Università di Macerata -Department of Science Politiche della Comunicazione e delle Relazioni Internazionali-, Civil Guard (General Directorate, Headquarters of Garrison Madrid and Academy of Officers of Aranjuez). Documentary and bibliographic collection was not limited to physical spaces, but extended to a global search in servers and specialized search engines on the Internet, records in databases such as: Dialnet, BUCea, Google academic, Miguel de Cervantes Library, SciElo and Scopus. (Toledo 2021, pp. 179–180)
b. Qualitative research technique
b 1. In-depth interviews
Addressed to the interest group, according to Hernández *et al*. (2014) "people, events, communities, etc., on which the data will be collected, without necessarily being representative of the universe or the

population being studied" (p. 562). The difficulties and barriers to access young people in Muslim communities are noted; especially fear, social, community and family environment that prevented any approximation. From this point, the design is reformulated, focusing on the story of experts (academics, professionals, police, in the first line of attention). The target population is defined, according to Valles (2004, p. 27) 'specialized' or 'elites', giving them the importance of the "profit in the political and sociological research of the elites […] important people in certain institutions or organizations".

b 2. Construction of interview tools

We opted for 'in-depth', 'unstructured' interviews with recognized experts, or elites" Valles (2004, p. 31), indicates that the questionnaire helps "translate the research questions (objectives, hypotheses, etc.) into questions or conversation matters with greater or lesser standardization and structuring" (p. 59).

c. Selection of the homogeneous sample of experts and geographical space. One defined the profiles of interest and limited to this list of key characters, they are contacted personally or online, inviting them to participate in the investigation. This contact to key experts allows to increase and extend to others, who based on this recommendation participate. Similarly and consistently to geographical spaces, those non-expert professionals who develop activities with the population at risk, personnel in the front line of attention to communities in their respective municipalities. The participation of social services, and security in the aforementioned municipalities, Guardia Civil, the National Police Corps and Local Police was requested.

These groups of non-professional experts are joined by representatives of the Muslim communities settled and representative in these municipalities. The bibliographic review and contact with experts, allows to place geographically the points considered "important" (population, concentration, police actions, detentions, political activism) (Cano, 2010, pp. 219-224). According to this, neighborhoods were selected in the municipalities of Fuenlabrada and Leganés in the southern periphery of the Community of Madrid and municipalities of Reus and L'Hospitalet de Llobregat, Province of Tarragona, Community of Catalonia (Cano and Castro, 2018, p. 20).

Results

The bibliographical experience, added to the story of experts of elites and professionals in the front line of attention and representatives of the proposed communities, allows to approach the actions carried out by radical groups—radicalized fundamentalist Islamists or jihadist Salafists—in their attempt to interfere, intend to undermine to weaken the structures and pillars of the modern and democratic State as the Spanish one, an aspired revolution from below, is how the police Intelligence service expresses: "in addition to their religion they make greater use of politics, where they seek to establish the caliphate, as a theocratic system, where democracy does not exist, without division of powers as we know in the West with democracy, its largest text and way of life is guided by the Koran and the Sharia".

Strategies, tactics and actions by which this ideology expands, often buried, uncontrolled, in spaces permeable to discourse, with affirmation actions for ideologization, physical and/or virtual places in communities within Islam, appearance of closed spaces, without interference from society and the State, 'ghettos'. Each elite expert consulted, expresses thus: "neighborhoods in which groups or communities have been concentrating […] such as Barcelona in which these groups have long dominated neighborhoods, ghettos, areas that are controlled, in which the social life of the community has its areas, its businesses", in the outskirts of large cities, from there trying to undermine, destroy and transform a democratic and social State a caliphal form of state for a single and irreplaceable Umma, which a Civil Guard Investigation team details: "the greater incidence of the probability of separation […] when its approaches and postulates are not accepted […] it chooses to retire and separate and will go to spaces for worship, less exposed to the public."

The jihadist, fundamentalist, Salafist and bellicose ideology is incubated since the beginning of Islam, its founding texts —Koran and Sharia—. Life and work of the Prophet Muhammad, inspires contemporary thinkers of Islam, ideological germ of groups such as Al Qaeda, Daesh and others, which tuck in and coalesce violence, seeking to achieve changes to return to the sources of Islam, rebuild the Umma and world caliphate, land of Dar Al-Islam.

Organizations such as Al-Qaeda and Daesh and related groups in this culture of jihad and violence, through tendentious manipulations and simplification of Islam, urge to carry out a jihad against the West, culture, society, democracy and citizens; to return and reoccupy geographical spaces from

where they have been expelled, Afghanistan, is an example of this situation, creating communication channels to spread their ideals, unify discourse, action and patterns of behavior, among other jihad, confirming messages of hatred, content and reaffirmation actions to their followers scattered around the world, reaffirming in the imagination of these small groups the just revenge, recreating the image of the 'distant or close enemy'; identifiable, persecutable by their attack on Islam, culture, politics, countries and communities; uniting to act against this enemy, making permanent the 'jihad of the open front'. In this story, Spain is a distant enemy: aggressor, usurper and plunderer, against which to fight until his expulsion from *Al-Andalus* to rebuild the Caliphate and Umma, as expressed in part of his propaganda of image 1.

Image 1
Propaganda in the jihadist narrative
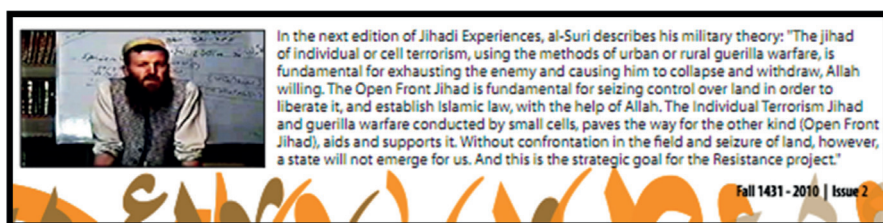
Note. Inspire, Fall 1431/2010, p. 21

In this diffusion there is no single message or religious content, Islam is omnipresent; it encompasses the forms of daily life of men and women in their community, propaganda and media are dedicated to reject social, community and political life in the West, interfering in the Muslim participation of any form of democracy; prior to establishing a political system other than the democratic State in giving al-hard, Islamist State that structures a new public and private coexistence of their communities, rejecting and expelling other forms of life, religion and culture of giving al-Islam*,* deepening the hatred towards those who do not think or act the same as the 'good Muslims', so the close enemy is persecuted, repudiated and jihad, which expresses the reading of this speech of image 2.

Image 2

Propaganda incites democracy replacement

La plataforma declarada del grupo francés Jama'at Al-Tawhid es representativa desde esta perspectiva general: "Nuestro mensaje al gobierno francés y de cualquier otra [institución que se rige por] la ley creada por el hombre es que los musulmanes de todo el mundo sólo se someterán a Alá (swt) y creerán que es un crimen y un acto de apostasía el obedecer una ley creada por el hombre, [tal como] la ley francesa.

"Los dos sistemas de secularismo e Islam están opuestos: no se puede decir que la soberanía y la supremacía le pertenecen al hombre, por un lado y que la soberanía le pertenece a Alá por el otro, debemos tener prioridad y [la prioridad] va hacia el Islam.

"Los musulmanes deben creer que el Islam dominara Francia y reemplazará la constitución del gobierno francés por el *Sharia*".

Note. https://islamenmurcia.blogspot.com/2011/08/

These strategic changes and dissemination performance have varied in form, format and content; together with technological advances and digitalization, the spread of radical ideas is increased, broadened, deepened and extended without intermediaries or risk to its target audience, with the intensive use of physical and now virtual media; Internet and other technological tools relentlessly disseminate images, audios and writings, as shown in image 3 of Inspire, magazine for the dissemination of its propaganda; shared, debated and participated by radicalized followers, emphasizing the dramatism, harmfulness and victimhood posed by the Western, common and concrete enemy, undermining the citizen coexistence in freedom, opinion and cooperation; inducing social distancing where it is settled, in European cities; ghettos, expression of isolation and distancing from the host society, as presented in Inspire, image 4.

Image 3

Story against democracy and participation

We'll have no part in the democracy and elections. We'll carry on the fight and we'll never negotiate. I wear clothes of explosives, I'm heading out to kill disbelievers. I'm a martyr, I'm an earthquake that shakes the palace built on pride. [Mohammed Younis Jihad Mal, Taliban singer]

Note. Inspire Magazine. 2010 edition, p. 5

Image 4

Account for inciting jihad

They should strive to follow the command of the Messenger of Allah ﷺ who warned Muslims from living amongst non-Muslims. They should either immigrate or fight Jihad in the West by individual Jihad or by communicating with their brothers in the lands of Jihad.
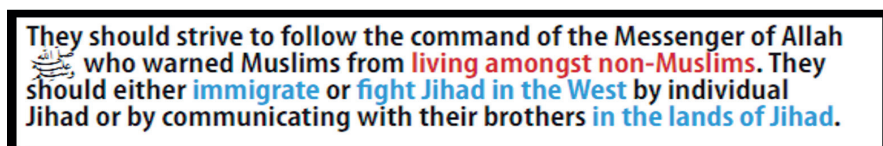
Note. Inspire in 2010 edition, p. 5

These forms of propaganda and content decay in physical spaces: formal or informal mosques, community centers, shops under tight judicial and police control, so the Internet, SS, chats and blogs find material: videos, audios

or magazines, which allow the uninterrupted connection between radicalized people, who access easily, safely, permanently, interactively and participatively; start to recruit, capture and radicalize until jihadization, and Inspire provides the media to followers, as shown in images 5 and 6.

Image 5
Interaction with followers

Note. Inspire, March 2010 edition. s/p.

Image 6
Interaction with followers

Note. Inspire, March 2010 edition. s/p.

It was pointed out that Al Qaeda is the expansion and deepening of the jihadist Salafi ideology, diminished after the action of national and international countries and institutions, while Daesh grows, adopts and rivals its discourse, objective and strategies for jihad; its tactics change, distancing itself from large objectives, focusing on tactics of individual terrorism, small coups, few resources; *homegrown terrorist*, lone wolf or *self-terrorist* modality, mostly online radicalization, highlighting the attractiveness among young people: catalyzed by means of "ongoing conflicts […] especially the conflict in Syria", guiding them to be active in a cause against infidels, apostates and heretics, "radicalized in ideology Jihadist Salafism".

This tactical turn causes the group cell to be replaced by a simple and basic one: the self-radicalized individual, without a clear profile, especially vulnerable and permeable to these messages, contents and affirmative actions; and the consulted elite expert expresses young people are very exposed to jihadist propaganda and a message that tells them how to act, think, live together and live their spirituality, which carries from their family, a history of no or little access to formal or informal education, high rates of illiteracy, dropout and school failure, and other shortcomings that are highlighted: what happens to the third generation?, new Europeans who have been born in a society that they do not recognize, with life experiences very distant from the culture that live at home, detached from their origins, and traditions; hardly revived at home; worsening their perception of "a Europe that is in a state of collapse, that is impoverished", where socio-economic-political gaps increase, exposed to xenophobic attitudes and subtle forms of discrimination. A geopolitical space that gives neither future nor work […] to young people born here or wherever, frustrated in the personal, family: disenchanted European citizens who manage the mother tongue and host, presumably adapted and inserted in their western community, undetectable to the police, outside any type of social, family or community control; lone wolves who sacrifice themselves for the emulation of a friend, family or other member of the network, their fight is revenge against a system that has been displaced, is invisible and forgotten.

In this chain of inciting and radicalizing actors, there is a possible link, the imam himself in his mosque (formal or informal), social centers; subjects with dowries and access to these spaces of great value, this situation is highlighted by one of the elite consultations, who highlights their importance as "radicalization agents in Europe", with the example of "United Kingdom", in whose reality these charismatic individuals are "the preachers in the mosques themselves […] a fundamental or propagandistic agent of radicalization", aggravated by the transcendence of imam in their culture and socialization, a powerful expression that reaffirms the content of the message and the actions that are promoted. In the Spanish case, "preachers have not been as important as charismatic activists […], the main agents of radicalization."

Others, jihadists returned to prisons or family homes. What is relevant in these individuals: charisma, observation and persuasion to probe the mood of the individual; ability to interpret at their convenience, religious texts and ideas that justify jihad, encouraging the consumption of propaganda; an em-

pathetic and persuasive discourse, isolating the captured from their community and host environment, getting the radicalizing, fundamentalist, bellicose, anti-Western and hate message, penetrate and take root, taking advantage of off-line or online spaces of the network; assuming fundamentalist, radical and violent ideas; thus, their world and interrelations are seeing from the prism of Islam, and from this prism with a often simplified interpretation they live it from a confrontation between Islam and Christianity, defenders of the laws of Allah, nothing with the intensive use of propaganda: they are seeing it on the Internet, reinforcing the indoctrination and ideologization and recent exploitation by jihadist networks, energizing the captured or group in recreating new identities and links; raising motivations in seeking new horizons, offering meaning to their lives: participating in a world project, framed as religious and moral, convinced in the legitimization of their acts.

In this transition towards jihadization, facilitators and chain of actors intensify the use of compendia, quotations and excerpts of Quranic lyrics, verses and hadiths, overexposing the Sharia and Sunnah, self-serving and justifying reinterpretations of Allah's purpose and mandate without countervailing arguments; what Eurogroup expects: "limited pseudo-religious arguments, intentional and severed arguments from the sacred texts of Islam, a crude manipulation of religious content to be used and internalized in these groups", to "exploit them […] within a regrettable successful process of radicalization around these ideas and achieve an excessive link of jihadist terrorist type".

In the opinion of the experts, beyond describing a specific profile of the vulnerable individual: "it is not that there is no profile, it is that there are many", refuting the definition of profile itself, hindering any attempt to approach "both to understand the phenomenon and to try to apply it to the current reality", making it difficult to prevent or control it formally and informally; the idea of a profile is a constant among the media, community and groups with xenophobic discourses.

In the family, individual socialized in a patriarchal traditionalist model, zero or low level of schooling of their parents, unable to share an appropriate religious knowledge, traditions and Muslim rituality, hindering cultural, religious transmission and community coexistence: "the father reaches a level that can not have on him, a force to locate him, to guide him, to draw his map or road map".

Socially, they live and coexist in precarious conditions or close to it, without access to housing, cohabiting in small and overcrowded spaces, says

one of the respondents; "We have indeed detected that there are homes in which five and six families live. […] a problem of marginalization, of coexistence."

On the other hand, these young people participate in community spaces permeable to actions of radicalism and religious fundamentalism, which progressively lead to a segregationist message, preventing them from being participants in the host community, spreading anti-Western expressive actions, such as the rejection of the democratic state, altering coexistence with the host community, transposing a rigorous and fundamentalist Islam, "complex areas, with a majority of immigrant, there are cultural and religion differences that create a parallel world." Thus, in the geography of the city, ghettos, parallel societies, expression of isolation and distancing of this minority proliferate, eliminating any possibility of contact and integration with the host community; taken advantage of networks so that its message, strengthened in propaganda, penetrates. Ghettos of poor, jobless, displaced, forgotten people, cohabiting in a religious, fervent and intolerant subculture.

In the labor market, restricted access to the labor market: low-skilled, temporary and low-paid jobs; in the economic, recurrent in social aid, those who perform this first care, describe that "with a curriculum and considerable training they are not able to access jobs offered", however, the feeling spreads "I am here by necessity. But I do not ask for anything: I do not want help. We have no right to ask for anything. We are foreigners. They look at us differently. We will always be foreigners here," they emphasize.

This benefits any form of radicalization, in our religious case; especially pre-adolescent males, adolescents and, to a lesser degree, young adults. However, there are minority opinions that point out that recruitment for radicalization can occur in any environment and social class.

Conclusions and discussion

The person who is captured, individual to radicalize: vulnerable to a psychosocial situation of failure, emotional immaturity, school failure, job marginalization, real or perceived uprooting, lack of integration, and frustration in their present and future expectations; without a sense of belonging; loss of the experiential thread of their predecessors (parents, grandparents); absence or weak individual or social identity; reduction of their family, religious traditions and rituality, social and cultural; uprooting, victim between

two cultures (of parents and foster care); experience and experience of discrimination by their religion, culture and modus vivendi.

The arrival and penetration of communications technology allows jihadist leaders, charismatic recruiters and the same terrorist network, a strategic change, transferring their speeches and performances from a physical environment to a virtual, anonymous and secure one. The anonymity, durability and transcendence of the message, repercussion and breadth of the content, entails greater geographical dissemination among followers.

Acting through the Internet has meant a quantitative and qualitative leap in the preparation, diffusion and *feedback* of propaganda designed to capture, essential in the socialization and jihadist irruption; internal communication, coordination and unification of the message, *modus operandi* and reinforcement, operational learning and counterintelligence. To a large extent the struggles and battles have moved from the physical to the virtual, waging there the new battles in the new wars.

In every revolt in the center or outskirts of Paris, Brussels or other European capitals and cities; in every space where vulnerable communities live, the discourse and reaffirmation actions are strengthened and explicit, where the State, services, agents are not able to enter; ghettos where the norms of a rigorous, fundamentalist and radical Islam prevail over the basic rules of life in liberal democracy, the actions of radical groups weaken the rule of law, and the ideologization of young Europeans for jihad is one of the symptoms of this regression.

Given the sense and phenomenon of radicalization in Islam by young Europeans, high social impact in Europe and Spain for its lethal effects on society and European population; facts of investigative interest are criminal offenses in Spain, which influenced the refusal of participation of a representative sample of the target population, having to adapt the design of research for inaccessibility to individuals of interest, limiting expectations and results.

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Political and social exclusion of Haitian migrants in the Dominican Republic: approaching a multidimensional racism

La exclusión política y social de los migrantes haitianos en República Dominicana: acercamiento al racismo multidimensional

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Abstract

This paper's research focuses on a multidimensional racism suffered by Haitians migrants in the Dominican Republic, which appears to be social and political as well. The direct experience of the author in the Dominican Republic strengthens an empirical and theoretical analysis for questioning a possible correlation between Dominican politics, nationalism, and popular support for the general exclusion, within the Dominican national system of Haitian migrants. Through an initial review of relevant literature, from the fields of Sociology and Migration, this article defines the concept of Agamben's Homo Sacer. Agamben's theoretical contribution is useful to identify the state's will to exclude Haitian migrants. In addition, Sayad's concept of State-thinking will also be used. Moreover, the historical focus on community's search for national identity relies on Rappaport's works and then related to the Dominican Republic. Exclusion and marginalization of Haitian migrants is also analyzed by outlining the lack of governmental data and updated information about immigrants, leading to hypothetical correlations between State-promoted illegalization of Haitian migrants, enforced by local politics, and a social dimension of racial nationalism. With a focus on International Relations on Political Science, the study describes that the current Dominican government, headed by President Luis Abinader, shows a trend influenced by a past heritage of political realism and nationalism in its bilateral relations with Haiti, since, it is worth noting, there seems to be relevant consensus in the Dominican society for such hardline policies.

Keywords

Dominican Republic, Haiti, migration, racism, politics. social exclusion, nationalism, marginalization.

Resumen

Este trabajo analiza la presencia de un racismo multidimensional, de carácter social y político, padecido por los migrantes haitianos en República Dominicana. La experiencia directa del autor en República Dominicana motiva la búsqueda de un análisis empírico y teórico que pueda interrogarse sobre una posible correlación entre el nacionalismo en la política dominicana y el apoyo popular hacia la exclusión de los migrantes haitianos en el sistema nacional dominicano. A través de una inicial revisión de la literatura de referencia del campo sociológico y migratorio, se define el concepto de *Homo Sacer* expuesto por Agamben. El aporte teórico de Agamben es útil para identificar la voluntad estatal de excluir a los migrantes haitianos. Además, se tomará el concepto de pensamiento de Estado identificado por Sayad, mientras que el foco histórico en la cuestión identitaria dominicana cuenta con aportes procedentes de las obras de Rappaport. La marginalización y exclusión de los migrantes haitianos se estudia también cuestionando la ausencia de datos y registros actualizados por el Gobierno dominicano, queriendo proponer eventuales correlaciones entre la ilegalización estatal de los migrantes haitianos, con el aval de la política dominicana, y una forma social de nacionalismo racial. Utilizando también un enfoque propio de las Relaciones Internacionales y la Ciencia Política, se describe cómo el actual gobierno de República Dominicana, encabezado por el presidente Luis Abinader, muestra una tendencia hacia pasados elementos de realismo político y nacionalismo en las relaciones bilaterales con Haití, donde, cabe incluir, encuentra un efectivo consenso por parte de la sociedad dominicana.

Palabras clave

República Dominicana, Haití, migración, racismo, política, exclusión social, nacionalismo, marginalización.

Introduction

Haiti and migration have become a kind of semantic union. The structural crisis of Latin America's first independent country, now in its third decade, has generated a continuing exodus of Haitians who are forced to leave everything in search of a better life. Haitians represent one of the main nationalities involved in emigration to the United States, settling even in the most remote regions of the North American country, taking advantage of the vast presence of nationals in diaspora (Joos, 2023). However, given the strict immigration policies implemented by US governments, starting with Obama, until reaching the repeated restrictions with Trump and Biden (Maresca, 2023a), the Haitian migration movement has had to look to other destinations. Some

countries in Latin America have shown some level of reception for Haitian migrants. Specifically, it is considered necessary to mention the main studies that have addressed the Haitian migration phenomenon in Chile, as a result of the COVID-19 pandemic (Rodríguez-Torrent and Gissi-Barbieri, 2022), and the work focused on the recent *diversion* of Haitian migration, from the United States to the Andean nations, such as Ecuador (Ceja and Ramírez G., 2022). In addition, Washington's harsh responses regarding the migratory pressure at the US border, is recently leading to a boom in the stay of Haitian migrants in Mexico City (Rodríguez, 2024). However, the new regional routes undertaken by the Haitian migration movement have obviously led to the adoption of more or less restrictive migration policies by those Latin American governments that have faced an immigration phenomenon, consisting of Haitians and Venezuelans among other nationalities, never seen before.

The presence of foreigners in certain territories who have rarely experienced relations with immigrant communities has given life to racist customs in both the civic-social and political spheres. A direct consequence of the correlation between migration and national politics, studied in this article, is the nationalist drift of national political contexts that construct part of their identity through the exclusion of the *other* (Avraamidou and Ioannou, 2023). Precisely, the study proposes that a significant degree of mutual ignorance between the so-called indigenous population and the immigrant community is not necessary for the politicization of this relationship. The case discussed here from the Dominican Republic (DR.), fed through the author's direct experience of the local reality, focuses on how, despite its long history of migration to the other side of the island, the Haitian diaspora continues to be subject to an exclusive politicization by Dominican politics and society. If in the countries of the Global North, main recipients of migrants, we witness emphasized phenomena of racism (Mantz, 2021), caused by the diversity between the parties and the ignorance towards the migrant as *another* and therefore considered *in toto* inferior, the same happens in a country of the Global South: Dominican Republic. Haitians and Dominicans interact daily because of the proximity of both nations, in addition to a long history of cross-border work and mutual relations (Taylor, 2014). This is not enough to avoid what Billiet and de Witte (2008) define as "political racism", being, in the case of Belgium covered by the authors, "the vote for a political party that clearly highlights anti-immigration positions in its political program and propaganda" (p. 254).

Theoretical framework

The research wants to extend towards the theorization of a *socio-political racism* underlying Dominican society, but endorsed by the political national populism present in the political scene of Dominican Republic. The hypothesis then tries to approach a form of correlation between the Dominican nationalist political narrative and the repeated political, social and legal marginalization of Haitian migrants, especially in Santo Domingo. Therefore, it will be appropriate, at first, to dwell on the bilateral relations between the Dominican Republic and Haiti, starting from the mandate of the current Dominican President, Luis Abinader, through a reading from the field of International Relations. Subsequently, there will be space for a specific axis of the Sociology of Migration and Political Science, where the general marginalization of Haitian migrants, their current role in Dominican society and their position of migrants legally excluded by the state system of the Dominican Republic will be analyzed. This work focuses on the broader meaning of migration policies, understood not only by the national rules that regulate migration. Rather, it speaks of a social and political practice in a given context, the Dominican, that forms a *de facto* racist dimension joined to a legal one, *de jure*, primarily studied in countries of the Global North, such as, again, the USA (William-White and White, 2011) and the Netherlands (Thomas, 1995).

This research seeks specifically to approach the relationship between politics and racism, in terms of the Haitian diaspora in the Dominican Republic. It is possible to affirm that this article consists of two methodological bases. The first, which will be detailed as purely theoretical, linked to relevant academic theories that have studied social and racial marginalization, in order to connect these contributions to the situation of Haitian migrants in DR. The main contributions to these studies come from the works of Agamben, on socio-political marginalization intentionally sought by the State (Newns, 2023; Maphosa and Ntau, 2021), and Sayad for the analysis of the positions towards the migrant as *another*. The second methodological basis is empirical, in order to combine part of the empirical experience of the author in the Dominican Republic and qualitative approaches inspired by reference research, especially those of Rappaport, which will later be discussed. In general, the theoretical contributions of Agamben, Sayad and Rappaport help to analyze *socio-political racism* as a multidimensional phenomenon.

This is not a discriminatory sentiment intrinsic to Dominican society, rather there is a historical journey that has taken this racism to a level of political promotion, i.e., state thought spread in society through the dictator Trujillo. When, during the Trujillo dictatorship, racism becomes political, it needs a stabilization of sentiment in society so that the two spheres unite, and definitively turn the Haitian into the *Homo Sacer* of Agamben. Ultimately, the current situation puts the Haitian diaspora in the condition of a subordinate group in DR., as theorized by Rappaport, but also legitimizing, always with the help of politics, the exposed *socio-political racism*. A qualitative approach has been used given the lack of current, objective and above all provided data by the Dominican State, which could be used instead to design a mixed study. However, this work has to be limited to a qualitative study, concentrating on the existing literature to offer a historical perspective of *socio-political racism* in the Dominican Republic, and try to connect what has been done in the past with the current situation. For the reasons outlined above, it promotes the continuation of similar works with a quantitative approach that could seriously contribute to the quantification of the Haitian diaspora and the creation of databases to be used by both the Dominican government and researchers and interested international organizations. Currently, there is no similar data source, constituting the main limitation for this article.

Methodology

The qualitative approach of this work benefits mostly from the concept of *Homo Sacer* created by Agamben (1998), which identifies a typical social categorization, where almost through a Marxist connotation of social antagonism, the State and some sectors of the population are confronted. Agamben argues that the state can ignore and exclude a select minority within its national territory. Thus, in the current era, certain immigrant communities can be included in the categorization of the *Homo Sacer* of Agamben, due to its precarious permanence in the country of destination, due to situations of documentary irregularity, legal prohibitions on the right to work and vote, and lack of regulatory protection in the laws of the State.

In this case, it is indicated that the Haitian migrant in the Dominican Republic has become *Homo Sacer* by the exclusion of the Dominican State. There is a situation of exclusion in which Haitian migrants, despite having

settled in Dominican territory, suffer from an enigmatic condition that leads to the impossibility of state protection, for example, because they lack documents. At the same time, the lack of attempts and willingness on the part of the authorities to solve these shortcomings generates consequences such as permanent entry into informality, social (and urban) marginalization and, finally, a general racism driven by nationalist political discourse. Methodologically, this article aims to bring Agamben´s concept of *Homo Sacer* to the contemporary migratory field, considering the contributions of Dzhurova (2023) where it is emphasized that for the governments of the destination countries, there are individuals "outside society and ignored by legislators, for not having the right to vote and not participating in the set of political and social activities" (p. 1125).

In other words, "for Agamben, there are state policies that legally exclude certain subjects. Specifically, *Homo Sacer* is considered for the State not worthy of being included in the socio-legal system" (Maresca, 2023b, p. 124). Recent studies have extended Agamben's analysis to include undocumented migrants, precisely minors arriving in the US in the category of *Homo Sacer* (González-Gorman, 2023). A qualitative analysis allows to compare, in a reduced but exhaustive way, the endorsement of right-wing political actors towards the maintenance of *Homo Sacer* in the national territory. In fact, having a perpetual *other*, establishing the absence of legal protection or respect for their human rights, also creates a political discourse of nationalist character. Using the influence of Sayad's work serves to determine the theoretical and methodological foundations of this research. The specificities of the Dominican-Haitian context led to having to consider the Dominican State as crucial to understanding politics and migration in the country. Sayad (2004) focuses on state thinking, i.e. state mentality to deal with a migration crisis. We could vary this concept, highlighting the state's political custom of approaching and treating migration as a problem, a crisis, but rarely an opportunity for cultural enrichment or pure humanitarian need. Boudou (2023) gives an interesting consideration to Sayad's categorizations, stating that there is a social reproduction of "state thought, by accepting officially valid labels, and legitimizing the speech produced by the state" (p. 405).

Basically, civil society tends to repeat those state positions, in terms of the treatment of migrants, that promote the stigmatization of the *other* through legal obstacles such as the requirement of visas or immigration requirements that are justly impossible to comply by the migrant to legalize their situation.

Civil society embraces the legalization of migrants that governments promote. The situation of Haitians in the Dominican Republic goes beyond a mere legal question of whether or not to possess the necessary documentation. We speak instead of a state, the Dominican, determined and motivated by popular consensus to exclude Haitians in its territory anyway, whether they were migrants or Dominican individuals, but of Haitian origin. Theoretically, Sayad's contributions to this peculiar state will to exclude individuals from society has received significant attention and deepening. As anticipated, it is not only a phenomenon of the Dominican-Haitian context, nor only a recent trend on the part of national states. For example, it is appropriate to mention Sayad's interpretation that Avallone and Molinero-Gerbeau (2021) propose, stating that:

> Migrants are fundamental to the State, since they exist not only reinforce the national community that recognizes itself as a separate unit from the presence of foreigners, but, when crossing its borders, legitimize the need to exercise control over them because if no one crossed the borders, they would not need to be controlled and, therefore, it would not be necessary to exercise control of the territory … (Avallone and Molinero-Gerbeau, 2021, p. 5)

Well, Sayad and the interpretations of his work give a pre-existing paradigm useful for understanding how Dominicans think of Haitian immigrants, in the same way their government does. Of course, we do not want to fall into a banal generalization that covers the entire Caribbean island. Instead, a hypothesis is offered that may be applied to a trend that, in recent years, has begun to take hold in the Dominican Republic. The relevance of Rappaport's work remains a pillar for qualitative methodology in the social, and even political field. Although Rappaport (1992) has focused on the relationship between the post-colonial state and subordinates in Latin America, referring mainly to indigenous groups, here we try to understand Haitian migrants as subordinates in DR. Specifically, given the vast prevalence of Haitians among immigrant communities based in the Dominican Republic, it is possible to assume that the Dominican state has progressively considered Haitians to be the minority par excellence.

In other words, the immense Haitian diaspora in the Dominican Republic can be understood as a subaltern group. As far as this work is concerned, Rappaport's main contribution concerns the attempt of a certain political class to establish an ethnic-national identity according to their will and convenience. Rather, national leaders seek to form "ethnic nationalism" (Rappaport &

Dover, 1996, p. 37). In reality, it is difficult, at least from a purely anthropological perspective, to draw an explicit ethnic differentiation between Dominicans and Haitians, which is not influenced by a political design of nationalist and identity character. In fact, it has already been proven that there is a form of historical and independence mythology, exercised by the Dominicans and their governments, which differentiates the ethnicity, or even, mistakenly, the so-called Dominican race from the Haitian one (Tavernier, 2008). This practice is mostly based on a reactionary historical reconstruction that aims *to* separate the two sides of Hispaniola. To conclude on the methodological and theoretical influences of this research, Rappaport (2011) also contributes with his work, as for Latin America, on the "ethnic-racial classes" (p. 628), understanding the set of attributes such as skin color, speech, or economic resources that are created to forge a national identity. This necessarily gives life to an identity nationalism that needs to find as many *inferiorities* as possible in the *other*, producing a structural racism supported by the State; this is what happens in the Dominican Republic to Haitian migrants.

Results

This section focuses on the empirical study on the exclusionary status of Haitian migrants in the Dominican Republic. Particular attention will be paid, within the framework of International Relations, to the severity of the foreign policy of the Abinader government towards neighboring Haiti, and how this political discourse affects Haitians in the Dominican Republic. It will then be important to re-point to the power of state thought, in line with Sayad's vision. Then, returning to the concept of *socio-political racism*, we will see the *social, political and legal exclusion of the Haitian migrant, which at the same time is shown as* Agamben´s *Homo Sacer*, but also constitutes, with its community in diaspora, the main subordinate group in DR, to refer to the foundations of Rappaport. The empirical contribution of the author, who has lived directly the situation in the Dominican Republic, will support the existing literature on the Haitian diaspora. It is necessary here to briefly provide the quantitative dimension of Haitian immigration in the Dominican Republic (Table 1), recalling the difficulty of data collection due to the "porosity of the border" Dominican-Haitian (Morán and Figueroa, 2005, p. 252) and the "laxity" of the Dominican migration system (Alfonso, 2011, p. 12).

Table 1

*Number and percentage of migrants in the Dominican Republic
by nationality reported in the latest available studies*

Nationality	No. of immigrants	%
Haiti	329 281	79.2
USA	25 814	6.2
Spain	7 062	1.7
Puerto Rico	6 083	1.5
Venezuela	5 417	1.3
Cuba	3 841	0.9
Italy	3 795	0.9
Colombia	3 606	0.9
France	2 043	0.5
Germany	1 661	0.4
China	1 484	0.4
Other countries	25 477	6.1
Total	415 564	100

Note. Own elaboration based on the Organization for Economic Co-operation and Development (OECD) and the Center for Research and Social Studies (CIES) (2017).
* It can be approximated that the number of Haitian migrants has grown in recent years, with the data updated to 2015.

To understand the relations between the Dominican Republic and Haiti, and how they affect Haitian migration, it is necessary to move the approach from the sociological perspective to the field of International Relations. In other words, it has to be reasoned in terms of State(s), as previously mentioned by Sayad. The parentheses for the plural are because, in fact, there is only one state that currently directs the direction of life of Haitian migrants, and that is the Dominican Republic. Before dedicating space to the current government of Luis Abinader, we try to emphasize certain historical influences on Dominican-Haitian relations, to understand that the proposed *socio-*

political racism is not a novelty, but an exacerbation of a structural feeling in the Dominican Republic.

The reason for this is the position shared by the Dominican governments of the day, and by international voices, who evaluate the last decades of Haiti as those of a failed state in all its possible forms and nomenclatures (Verlin, 2014). We are facing a paradoxical dimension, where *socio-political racism* is strengthened by the drama in the land of the *other*. The Dominican nationalist and identity cult finds fertile ground when, on the one hand, domestic politics promotes exclusive nationalism with respect to the Haitian immigrant, and on the other, Dominican foreign policy maintains a rigid antagonism that wants to differentiate itself from the chaotic condition of the Haitian state. Substantially, there seems to be, in principle, a limitation of agency on the part of society, understood as the Dominican people, with respect to the aforementioned thinking of the State. The conditions would be provided for society to justify that state "coercive power" of "realism" (Sleat, 2016, p. 7), because Dominicans are in favor of Dominican foreign policy as long as it is nationalist. Then, in addition to an international realism, there is a national, political and social realism, where the governmental foreign policy falls directly on society, finding popular consensus. The same Dominican identity is radicalized there when relations with Haiti reach, possibly, their worst point.

Lee Turits (2021) identifies the massacre of Haitians, committed during the Trujillo dictatorship in 1937, at the point of no return in terms of the identity-nationalist division between Dominicans and Haitians. Lee Turits' argument is that, with Trujillo in 1937, "in order to quickly tighten the political border between the Dominican Republic and Haiti, it became necessary to establish a social separation between the two ethnic groups", thus annulling the Dominican-Haitian "multi-ethnic national community" (p. 92). From 37, Trujillo began to build an existential narrative about the relations between the Dominican Republic and Haiti. State thought as visualized by Sayad finds effective representation in the period following the massacre. In fact, Trujillo promotes an "official history" whereby the killing of Haitians has been necessary to preserve the very existence of the Dominican state (Farid, 2016, p. 45). Trujillo's discourse then set the Dominican popular narrative about Haitians during the dictatorship, reinforcing it in the 1940s. In his historical compilation, Childers (2021) describes that the economic instability of DR led Trujillo to implement a policy of blaming Haitians until the 1960s,

through even school projects for racial indoctrination against Haitians, thus considered "a problem" (pp. 11-12). Figure 1 provides a material testimony of the effect of the Haitian massacre of 1937.

The apparent recovery of democracy in the Dominican Republic, under Joaquín Balaguer, did not represent an improvement in the conditions of Haitians in Dominican territory, but a variation of this racism. In other words, since 1968 there has been an instrumentalization of Haitian migration, because it is understood the labor need, especially in the sugar industry, of the Haitian workforce that is exploited and maintained in DR only when it is economically needed (Hintzen, 2014). In this way, Haitian migrants began to live a kind of functional and marginalized confinement, being employed in the sugar towns called bateyes (Wilson, 2022), where the precarious coexistence with the Dominicans was restricted to a relationship between employer and employee. Turning now to the present day, it is possible to suggest that the identity divide described between Haitians and Dominicans was prolonged in time, and can be supported today by two factors. The first concerns the destruction of the Haitian state system, which, together with the border pressure on the Dominican government, fuels an antagonistic discourse by *us* against *them*. The second, is anchored with Dominican identity nationalism that uses this *socio-political racism* to strengthen itself. As early as 2013, the Dominican state's political-legal positions began to show a discriminatory connotation. The Inter-American Commission on Human Rights considered that Dominican Constitutional Court ruling 168/13 appealed to statelessness; the rule attributed Dominican nationality only to individuals born in Dominican territory and to Dominican parents, with retroactive validity (IACHR, 2015). Under these conditions, the government of Luis Abinader, inaugurated in 2020, has had to confront the Haitian question with particular frequency, it must be recognized, for the total degeneration (political, economic and social) in which Haiti has fallen. However, Haitian migrants in the Dominican Republic and Dominicans of Haitian origin are also affected.

Figure 1

Account of the Haitian Massacre of 1937, including the international and bilateral consequences between DR. and Haiti

Note. Photo taken by the author at the Dominican Resistance Memorial Museum, Santo Domingo.

This research conforms with the considerations of Duany (2006), where it is accepted that there is "prejudice and discrimination towards Haitians and descendants of Haitians in the Dominican Republic" (p. 236), not wanting to get lost in establishing a historical debate on the causes, but to attend to the reasons for their current political assertion. Under Abinader's administration there has been a political-normative action that has fully turned the Haitian

migrant into Agamben´s *Homo Sacer*. In 2022, Abinader ratified Decree 668-22, which strengthens the search for undocumented migrants, most of whom are Haitian, but also admits the expulsion of Dominicans of Haitian origin, if they are undocumented (Childers, 2023). In the same study, Childers also reports the cancelation of the public medical service for undocumented midwives. Among all the measures taken by the Abinader government, the latter seems to be the main expression of current *socio-political racism*, where mere domestic political interest undermines humanitarian values. If this research refers to *socio-political racism* towards Haitian migrants, according to Agamben´s concept of *Homo Sacer*, it is precisely because the current administration seems to approve measures that do not seek to regularize Haitian immigration, but to make it legally invisible. It is a legal, social and political marginalization, which in fact provokes criticism in the Dominican Republic. For example, it should be noted that there are no state efforts to update the actual number of Haitian immigrants in the country. In cities like Santo Domingo, the presence of Haitian immigrants, as well as in border places (the areas of Dajabón, Jimaní and Pedernales), can be marginalized, but not completely invisible. Figure 2 shows one of the few available compilations of updated data on Haitian immigration in the Dominican Republic, in fact, by the International Organization for Migration (2021), and not by the Dominican government.

Figure 2
Documents held by subjects interviewed in border areas
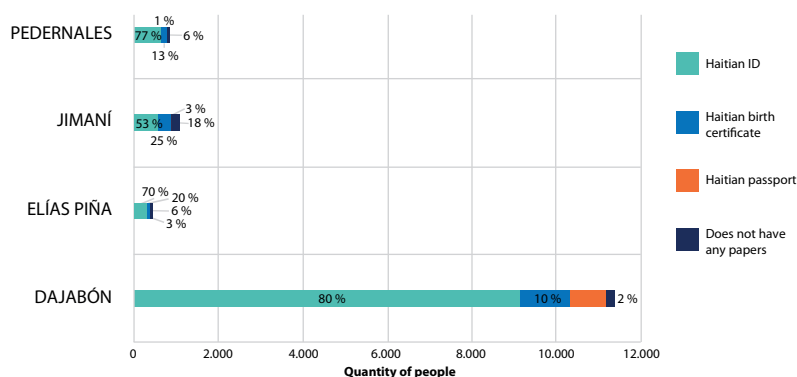
Note. International Organization for Migration (IOM) Survey (2021).
*Only data available to approximate, in a quantitative and objective way, the dimension and condition of Haiti-DR migration.

The absence of a continuous accounting of Haitian immigrants by the State generates the feeling, in society, of foreign invasion, as perceived by certain sectors in the United States (Angulo-Pasel, 2023) and Europe (Miccoli and Ambrosetti, 2023). In particular, the replication of certain anti-immigrant sentiments typical of the United States in the Dominican Republic has been used during the COVID-19 pandemic by the Abinader administration, allowing and nurturing a Trump-style rhetoric (for example with the construction of a border wall and the closure of the border) of blaming the Haitian migrant for all the problems of the country (García-Peña, 2022). There is a practice of "social reproduction" (Molinero-Gerbeau 2020, p. 6), i.e., the reproduction of certain values or acts lived by one subject or community, towards a different being, the *other*.

To clarify, Dominicans direct towards Haitians the *socio-political racism* they suffer in their destination countries, not coincidentally, the United States (Aparicio, 2007). Socio-*political racism* in the Dominican Republic can also be explained by a form of search for social, racial and political superiority of Dominicans. The trend just shown transforms the act of removing the *other* from the national territory into a strategy of political approval by the authorities. The deportation of the migrant, the great fear of Dominicans in the United States (Alex, 2020), is contrary to the approval of Abinader's followers, when those involved are Haitian or even Dominican migrants of Haitian origin (Bonifacio, 2022). The *socio-political racism* perceived in the Dominican Republic is aided by an exclusionary marginalization, which is also legal, or better of non-legality, which is also manifested at the urban level. In Santo Domingo, Reynoso Estrella (2021) has approached the precariousness and urban informality of Little Haiti, among the humblest and most forgotten neighborhoods of the Dominican capital, where Haitians suffer a condition of "urban vulnerability" (p. 120). Of course, this research does not want to ignore that socioeconomic precariousness, from the labor to housing, is a stark reality also for Dominican citizens. To conclude, although this investigation does not want to delve into the merit of the political success of the Abinader administration, whose evaluation remains in the hands of the sovereign Dominican people, it is worth highlighting one last point. The nationalist discourse and immigration policy of the Abinader government has received criticism even from the Dominican ruling class itself. The current Ambassador of the Dominican Republic in Spain, Juan Bolívar Díaz, has been among the most notorious in criticizing the racist and extremely natio-

nalist drift of Dominican politics (2021), also pointing out the lack of a responsive tool to effectively measure how big the perceived Haitian migration emergency is in DR.

Conclusions

The investigation does not want to look for institutional culprits or demonize certain actors of Dominican politics. Rather, it has tried to offer theoretical and empirical views to approach epistemologically the current situation of the Haitian migrant in the Dominican Republic. Therefore, it is possible to conclude that there seems to be, in the Dominican context, some support for restrictive and discriminatory policies towards Haitian immigration. As described above, there are social and identity reasons, rooted in Dominican history, that can explain where this nationalist and exclusionary sentiment that needs the *other*, Haitian, comes from in order to be reinforced. Maintaining the hypothesis of a latent *socio-political racism* in the Dominican Republic, which today turns the Haitian migrant into *Homo Sacer*, it is possible to reach the following conclusions:

- In order for an individual to suffer the condition *of Homo Sacer*, the subject, or his or her community, must be legally, socially, and politically excluded from the national system in which he or she finds himself or herself. The recent measures adopted by the Abinader government in the Dominican Republic confirm a vigorous application of rules aimed at the expulsion, deportation and outlawing of Haitian immigration.
- If there were no racism both political and social in the Dominican Republic, then there would be no consensus, tacit or explicit, on the part of the population towards this exclusionary and nationalist discourse. The Dominican state, historically and with particular emphasis since the Abinader government in 2020, seems to have elevated its view of Haitian immigration to the main way of thinking about migration in the Dominican Republic. It would be inappropriate to get a full causality between state thought and social mentality in the face of the Haitian diaspora, but one can conclude that there is a kind of political correlation.
- We must not forget the magnitude of the Haitian crisis, which represents one of the main motivations for the difficulties in bilateral relations between the Dominican Republic and Haiti. This situation

entails significant antagonism shared by both the government and the Dominicans, making border pressure the main reason for any problems on the island.

• The lack of an up-to-date, objective and continuous measurement of Haitian immigration by the Dominican state implies two consequences. The first covers the feeling of invasion that the Dominican perceives, when the number of Haitian immigrants in Dominican cities is not really known. The second is institutional neglect and the social, urban and political marginalization to which Haitian immigrants and Dominicans of Haitian descent are exposed, with the lack of formal registration by the State being one of the causes for their relegation in the set of national protections.

This research has been limited to a brief review of the relevant literature and empirical contributions of the author, who do not want or cannot demand a general and global portrait of the migratory situation for Haitians in Dominican Republic. The lack of objective, substantive and updated data by the Dominican government forms an essential limit for the objectives of this research. The present work could be continued with a quantitative analysis towards the accounting of Haitian immigration in Dominican urban centers, where a similar project would be more viable than at the border, due to closures and volatility of the context that do not allow the necessary conditions to the investigation. Finally, the research has not sought to analyze Haitian immigration through interviews, despite the author's direct experience in the Dominican Republic. Due to the precariousness and insecurity experienced by Haitian migrants in DR, it is not recommended to continue similar studies with surveys that, in addition to being ethically questionable, could negatively affect the position of Haitian immigrants in front of the Dominican authorities.

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The limits of the graphic narrative of migration in the public media discourse and the human rights approach

Los límites de la narrativa gráfica de la migración ante el discurso público mediático y el enfoque de derechos humanos

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Abstract

The intensification of violence and the violation of human rights in migratory crises is currently a main topic in the experimentation of graphic narratives, which have given rise to the hybrid and critical genre represented by the graphic chronicle and the graphic novel of migration. The verbo-visual treatment is analyzed in the series of twelve graphic chronicles of migration "My life as an immigrant in Chile" (2018) of Sábado Magazine, in the newspaper El Mercurio, an agent of public discourse that has consolidated stereotypes and prejudices about migrants. Through qualitative content analysis of the image-text articulation, the verb-visual strategies of the graphic chronicle of journalistic and literary tone are examined. The elements that confer authenticity, reliability and veracity to the chronicle were established according to the use of testimony, portraits of the protagonists and contextual data. Likewise, literary elements were determined such as the staging of vulnerability, enhancement of the cultural fabric, multiple narrative voices and the recreation of resilient resistance, which allude to the human rights perspective. The graphic chronicle intensifies the use of the testimonial voice and omits the author (witness), but the latter appears in the verb-visual articulation in biases and introduction of the ambiguity of migration experiences, and in the relationship with the "distant near". The graphic chronicle of migration can be significantly modulated by the mediatized public discourse, weakening its critical reading of reality.

Keywords

Human mobility, graphic chronicle of migration, verbo-visual strategies, public discourse of migration, human rights, intermediality, memorialization, Chile.

Resumen

La intensificación de la violencia y la violación a los derechos humanos en las crisis migratorias es en la actualidad una temática central en la experimentación de las narrativas gráficas, las que han originado el género híbrido y crítico representado por la crónica gráfica y la novela gráfica de migración. Se analiza el tratamiento verbo-visual en la serie de doce crónicas gráficas de migración "Mi vida como inmigrante en Chile" (2018) de la Revista Sábado, inserta en el periódico El Mercurio, agente del discurso público que ha consolidado estereotipos y prejuicios sobre la población migrante. A través de análisis de contenido cualitativo de la articulación imagen-texto se examinan las estrategias verbo-visuales de la crónica gráfica de tono periodístico y literario. Los elementos que confieren autenticidad, fiabilidad y veracidad a la crónica se establecieron de acuerdo con el del testimonio, retratos de los protagonistas y datos de contexto. Asimismo, se determinaron los elementos literarios como la puesta en escena de la vulnerabilidad, realce de la trama cultural, de las voces narrativas múltiples y la recreación de la resistencia resiliente, que en conjunto aluden a la perspectiva de derechos humanos. La crónica gráfica intensifica el uso de la voz testimonial y omite la del autor (testigo), pero este último aparece en la articulación verbo-visual en sesgos e introducción de la ambigüedad de las experiencias de la migración, y en la relación con el "lejano próximo". La crónica gráfica de migración puede ser modulada significativamente por el discurso público mediatizado debilitando su lectura crítica de la realidad.

Palabras clave

Movilidad humana, crónica gráfica de migración, estrategias verbo-visuales, discurso público de migración, derechos humanos, intermedialidad, memorialización, Chile.

Introduction

Migration is one of the themes considered in the exploration of new contemporary narratives immersed in the search to give meaning to the human mobility narratives that have been mediatized and framed in ways that weaken their historical, political and ethical thickness, both in the construction of the problem and its characterization, and in the proposal of solutions (Bettaglio, 2021).

This situation also occurs with other social phenomena that lead marginalized populations, events that have found their place of enunciation in the journalistic chronicle, essays and attempts that date back to the 1960s with the New Anglo-Saxon Journalism and the Latin American Chronicle (Sierra

and López, 2017). Since then, the chronicle has been conceived as the formula that opens up to new ways of listening and expressive forms that violate the modern classifying order that established the border of discourses between journalism and literature, fiction and reality, the author/authorized subject and the subject represented, oral and written culture, image and word, oral and written. The chronicle tolerates transits and displacements to fulfill the visibility of social phenomena from a perspective differentiated from the mainstream of global media. Rosana Reguillo (2000) warned more than twenty years ago that the great challenge of the future would be in "the transversal discourse", understood as that which crosses all other forms of discourse, as it constitutes the "center" of public space.

The Mexican experience of transit to the United States is the paradigmatic case to examine the narrative about migration in Latin America. It is a country with a long tradition of "expelling" migrants, and human mobility is part of the public and private agenda. From this condition arises a varied and rich narrative production created by Mexicans, and that reaches its peak in the second half of the 20th century (Reyes, 2019). The Mexican migratory experience and its representation (journalistic and literary) has revealed that there is a correlation between the history of Mexican migration to the United States and the development of the migration chronicle, characterized by focusing on individual experiences of marginalized people, stories not available to the reading public (Brown, 2012). Thus, the variations that the documentation and narration of the migratory phenomenon has experienced are due to the events that affect the social fact itself, among them the changes of security and control measures, the intensification of new/old routes and border crossing points, the incorporation of new populations into the mobility flows from other places as a result of the war, economic crises, etc. Following this approach, it should be noted that at the European level the graphic narratives increased with the increase of migratory flows since 2015 as instruments of social mobilization to generate empathy and encourage commitment to marginalized biographies (Boum, 2021) and counteract the inconsistencies of the Eurocentric vision on transnational journalism migration (Sperb and Boff, 2021). The social impact of the Spanish economic crisis of 2008 had motivated several essays of graphic narratives that allowed the coining of the notion of "social comic".

Thus, the chronicle of migration opposes the public discourse (of the media and other public forms) that focuses "the problem of migration" on the

border and the undocumented as an anonymous and negative collective experience, that omits the socio-economic processes that drive the individual experiences of migration, and also relegates the processes that emerge from it, among other aspects that are unrecognizable in the dominant narratives of the media and other forms of public discourse.

As a consequence of the intensification of violence and the violation of human rights in migration processes, this is a thematic focus of attention in the experimentation of graphic narratives, which have originated the hybrid gender represented by the graphic chronicle and the graphic novel of migration. Thus, the graphic narrative on migration constitutes the crossing of a double border since it addresses human mobility from the transit between disciplines.

Unlike the graphic novel which since the 1980s has been the subject of study in its artistic-communicational aspect (Dapena, 2015) and in its educational uses for the promotion of reading (Alarcón and Paladines, 2023) and as a literary field that has motivated the emergence of specialized publishers, a reading market (Conde Aldana, 2019; Gómez, 2020; Baya and Ruiz 2021) has encouraged the development of literary criticism in the subject. The graphic chronicle has not received the same attention. Studies on the graphic narrative of fiction in Chile, which encompasses both comic and graphic novels, gained momentum in the 2000s, focused on the relationship between graphic novel, historical memory and fictionality that questions the dominant historical narrative about the Pacific War and the Dictatorship, and the visibility in the comic of excluded social actors and their problems (Hinojosa, 2018). It can be considered that in Chile the graphic chronicle has had a less dynamic process in production and in its study, contrasting with the situation of the graphic novel.

However, various social organizations have adopted the graphic chronicle in their awareness campaigns on different current issues and as a form of participation in public debate despite the difficulty of achieving wide circulation because it is outside the commercial circuit. "My life as an immigrant in Chile" (2018) is one of the few graphic chronicles developed by the Chilean press, under one of the two journalistic consortia that controls the sector (El Mercurio), a characteristic that enhances its particular condition and justifies its study. The conditions of production and circulation of these chronicles place them in a "conflict zone" between the vocation of critical interpretation of the reality inherent in gender, and the institutional framework given

by the public discourse on the migratory phenomenon that the journalistic consortium maintains and that has been questioned by media studies in Chile.

The questions that arise are the following: what are the narrative implications of the combination of journalistic resources and literary resources in "comic journalism" to relate migration in Chile? What happens to the processes of memorialization or memory production about the phenomenon of human mobility that the graphic chronicle develops under an editorial line characterized by the construction of stereotypes and prejudices about the migrant population? How do verb-visual resources oppose and harmonize in the graphic narrative that allude to the public discourse on migration in Chile and the perspective of human rights as polar opposites?

The aim is to analyze the verb-visual treatment of migration in the graphic chronicles "My life as an immigrant in Chile", carried out by El Mercurio, a medium characterized by installing segregation discourses on the migrant population and consolidating stereotypes and prejudices that prevent the recognition of the other from the difference and the development of intercultural communication (Browne and Castillo, 20103). This case reveals the internal tensions of the graphic chronicle when it is a significant practice modulated by the dominant discourse to which it is attached, but at the same time it questions.

Production and memory of graphical migration narratives

Heirs to the chronicle of migration that takes as its object the invisible suffering of human mobility, the graphic novel and the graphic chronicle both agree in being considered "multimodal literature" (Kuechenmeister, 2009) as a verb-visual sequential art that links juxtaposed pictures or vignettes (Parodi and Julio, 2017).

The graphic chronicles and graphic novels of migration can be seen as the ways of expressing criticism about the theories of the liberal subject and the liberal democratic state that underlie the modern international human rights system (McClennen and Slaughter, 2009), and that since the concern about the exacerbation of anti-immigrant rhetoric and the proliferation of complaints of injustice, brutality, cruelty towards migrants and the violation of their rights, have ventured into the exploration of narratives that try to oppose polarized public discourse. Thus, a hybrid narrative production on migration emerges,

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based on the multimodal language that links image and text, and unites and superimposes historical stories, images, various pictorial techniques (painting, drawing, engraving, digital art), extending to the field of intermediality, in which works and artistic tasks are transited.

Along with this hybrid production, the literary criticism emerges in parallel (Dawes, 2016), which highlights violence as the hinge that links life and narrative and exposes not only the deep structures of violation of rights but also the representation of such structures, since these are contexts in which the victims are not able to produce their narratives, formulate criticisms, share their precarious lives and their deaths are not regrettable (Butler, 2012).

In particular, the graphic chronicle is placed on the border of emerging news genres and literature, while the journalistic tone is maintained by the testimony, and the literary tone by the author's observations and personal opinions that warn of the economic and social factors of the tragedy, such as the physical challenges of the migrant in his/her displacement. The text and the drawing are articulated in the graphic chronicle and cease to be independent bodies, and they put in play a repertoire of authenticity and reliability resources to ensure the distance with the fiction and the identity of the novel (Weber and Rall, 2017). The graphic novel, for its part, often uses the cinematographic language to produce the visual narrative, and creates a symbolic apparatus based on the chaining of meanings, such as the suitcase-memory (Durante, 2016) or the wall-scar (Castilleja, 2023). However, both narrative genres agree in multiple resources to document the invisible and memorialize shattered stories and lost voices that stress the triangulation between the official public discourse, the word and expressions of migrants, and the substitute or vicarious experience experienced by the reader, the contemporary reader or subsequent generations (Castilleja, 2023). Finally, it is a mediated process of memory production that in turn feeds on memories.

Materials and method

The book of graphic chronicles "My life as an immigrant in Chile" is made up of 12 four-page chronicles of vignettes, published by the newspaper El Mercurio de Santiago through its Sábado magazine. The chronicles appeared biweekly from November 2017 and throughout 2018. In parallel, fragments of the chronicles were disseminated through the Twitter account

of the Sábado magazine and in late 2018 they were compiled in book format to commemorate the twenty years of the magazine. We observe the strategy of combining media in which each contributes with its own materiality and give rise to a new product resulting from an integration of the different media of the journalistic company.

It should be noted that El Mercurio is the oldest newspaper in Chile and the one with the largest circulation nationwide, with a conservative editorial line as the property of the country's economic and political elite. The company El Mercurio presents the Sábado Magazine as "the most read in Chile" and defines it as "a current magazine focused on those who like to inform themselves in an entertaining way about Chile and the world. Its main content focuses on social and political contingency issues, but also contains more playful sections related to humor, fashion, gastronomy and culture."[1] The current treatment is framed by this declaration of identity that leads the work of the team of the project of graphic chronicles on migrants in Chile. Journalists from the newspaper El Mercurio carried out the investigations and scripts,[2] while the award-winning Chilean cartoonist Francisco Javier Olea —winner of the 2012 Altazor prize for the National Arts— elaborated the verb-visual discourse of these graphic chronicles. Olea has been drawing for El Mercurio since 1999, and has an extensive published work that encompasses portraits of public figures, graphic humor comics, children's literature and graphic novel, as well as works for companies.[3]

"My life as an immigrant in Chile" raises questions about the relationship of graphic narrative with the memorialization of migration when this narrative responds to media logics, i.e., the influence of the media on the way the material is organized, the style in which it is presented, the focus or emphasis on particular characteristics of behavior and the grammar of media communication (Altheide, 2004). Finally, these logics that permeate the narratives correspond to conventional procedures that characterize the media, such as the criteria of newsworthiness (Thornton *et al.,* 2012).

This research had specific objectives to differentiate in the graphic chronicles the elements or resources of the journalistic treatment and the relationship that they establish with the public discourse on migration in Chile.

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1   See https://bit.ly/3w6UwMP
2   Carla Mandiola, Muriel Alarcón, Gazi Jalil and Jorge Rojas.
3   See https://bit.ly/3wisgqg

Likewise, the characteristic elements of the graphic novel that are articulated with the features of the graphic chronicle with the purpose of making visible that invisible in the migrant experience were identified.

The methodology of the study consisted in the application of qualitative content analysis on the verb-visual strategies of the journalistic and literary graphic chronicle. Thus, an analysis matrix was elaborated to apply to each chronicle, formed by the categories that confer authenticity, reliability and veracity to the chronicle and that come from the conception of the journalistic narrative: presence of the author/journalist's voice, physical resemblance of the portraits with the protagonists, stylistic resources, documentary evidence and meta-narrative (Weber and Rall, 2017). To establish the literary elements of the graphic novel active in the graphic chronicle, a matrix that relieves the perspective of human rights is applied, formed by the categories staged of vulnerability, enhancement of the cultural plot, testimony and re-creation of resilient resistance (Mickwitz, 2020).

The following is the treatment of the Chilean press on the migrant issue between 1990 and 2020, which constitutes the matrix of the public discourse on which the graphic chronicle "My life as an immigrant in Chile" would emerge as a counterpoint or critical discourse. The results that emerged from the application of the analysis matrices that expose the nuances of public discourse in the graphic chronicles and the human rights perspective are then systematized.

Results

The Public Discourse on Migration in Chile and the Critical Choice of the Graphic Chronicle

The graphical chronicles of Revista Sábado were published in the context in which the migration issue occupied a main place in the public agenda (at the end of 2017), crossed by the electoral environment of the administration of Michelle Bachelet and the ascension of Sebastián Piñera in the presidency of the country, which meant a displacement in the leadership of Chile from the center-left to the center-right and changes in the treatment of migration. The enactment of a "New Migration Law" was part of Piñera's electoral discourse arguing the need for a "new deal" towards the migrant population,

and already elected in March 2018 prompted the modification of the current rule by increasing visa requirements. Likewise, in 2017, Venezuelans became the largest foreign population in the country, ahead of Peruvians who have been the majority since 1990 (Stefoni and Brito, 2019).

Among the trends in the treatment of migration by the Chilean press between 2017 and 2018, there is no significant association between immigrants and crime, violence, illegality, as had been observed in the 1990s when the press openly offered anti-immigrant representations (Doña, 2022). However, in the 2000s, studies on media and migration coincided in the strengthening of negative stereotypes, and the affirmation of national/foreign opposition, as well as the deepening of the repertoire that encompasses the paternalistic but also the criminalizing gaze (Browne and Castillo, 2013; Póo, 2009). In the second decade of the 2000s, the equivalence between migration and illegality, poverty, crime persists in the media, in addition to the racist discourses (Stefoni and Brito, 2019) derived from the intense Haitian migration flow since 2010.

In the period of 2017 and 2018, when "My life as an immigrant in Chile" was published, the migrant subject was defined in the press from the governmental and economic discourse, focused on the regularization of residence in the country and on its characterization as a labor force in certain productive sectors (Ivanova *et al.,* 2022). Along with the conception of the migrant subject as an economic and production body (Green and Zúñiga, 2023), the paternalistic discourse that exploits the epic of strangeness in an alien and unknown environment appears again to highlight the reception in Chile, a procedure that leaves no room for presenting the agency of the migrant population. In this way, they are only conceived as recipients of government actions and the idea of their dependence is reinforced (Galindo, 2019). It also established the nominal differentiation that the media makes between Haitian residents of the rest of the unified nationalities in the "migrants" category, which reveals the distinction about the "black migrant" (Tijoux and Palominos, 2015).

Revista Sábado is positioned within these significant practices focused on the discourse of authority of state agents with respect to migration in Chile and manifests itself as the bearer of a different discourse without specifying what its differentiation consists of. Revista Sábado, "the most read magazine in Chile" (El Mercurio, 2018) defines itself as a mirror of Chilean society as it ensures to reflect the social and cultural changes that the country has

experienced in the last twenty years (El Mercurio 2018, p. 9), one of them a result of the growing migratory wave that has gained importance. Revista Sábado maintains that its journalistic reports document the life, problem and odyssey of the various people who have arrived in Chile, however, they warn that all the stories are summarized in similar stories of triumph or defeat (El Mercurio 2018, 9). Thus, they conclude that the option for the graphic chronicle would allow them to differentiate the multiple experiences of immigrants in Chile. The criterion is recognized in the selection of diverse stories: three women (Filipina, Bolivian and Iraqi-Palestinian), eight men (two Haitians, one Venezuelan, Dominican, Chilean in Colombia, Bolivian, Nepali, Russian) and one Iraqi family. The variety of stories also reached other socio-cultural categories and situations of "success and failure", portraying people who perform different trades and activities in the chronicles (seasonal worker, nanny, referee/football reporter, hairdresser, police, miner, footballer and mechanic), and also unemployed (such as the Iraqi family) and others who in the story cannot be determined if they have a job (Venezuelan referee). This central feature in the stories, which points to its place in the labor market, is a continuum of the migrant-body economic and production.

The graphic chronicle at the frontier of public discourse: humanization and anonymity

Each story in "My Life as an Immigrant in Chile" would illustrate extraordinary situations of identifiable people with names, surnames and portraits; only the Venezuelan referee Jorge Castañeda lacks an image of the story "The Caribbean Voice of Football." The identification of subjects has been considered a resource for the re-humanization of anonymous cultural narratives imposed by the cultural norms of globalization that represent migration as a collective, quantifiable and anonymous experience, which hinders empathy and solidarity.

The homophobic persecution of sexual dissidents (Russian homosexual) is one of the particular experiences of graphic chronicles, along with those of childhoods traumatized by war and exile (an Iraqi-Palestinian girl who reaches adulthood in Chile) or by catastrophe (a Bolivian miner who survived the case "33 miners" buried in the San José mine), victims of femicide (a Bolivian woman killed by her partner who is only called Silvia) and repa-

triation of ashes as an ecumenical act (a dead Haitian evangelical transported by a Catholic priest). The variety of stories tries to express the wide range of migrant experiences and to question stereotypes and representations linked to violence and crime. "Monki's Journey" is the only story that describes crossing the desert and illegally entering Chile with a coyote, but concludes with regularization of his residence while working in a textile factory. The figure of the undocumented migrant, together with the negative portrait that pluralizes the experience of human mobility, placing it also in the register of the foreign threat, appears here represented in a positive way and restored in history on a large scale when they are usually erased from all memory.

Francisco Olea clarified in an interview (Díaz, 2019) that the order of the chronicles in the book was the same as those published in Sábado Magazine, which allows us to observe the evolution of his drawings and his understanding of the migrant theme. From this point of view, "My life as an immigrant in Chile" exposes Olea's graphic search exercise to narrate migration, and shows how it transits from stories of helpless subjects who suffer from cultural uprooting and estrangement invoking compassionate paternalistic discourse, to finally narrations that privilege the public discourse of dependence. However, it remains attached to certain patterns of the chronicles. Male and female migrants are subject to the narrative pattern of the hero/heroine facing challenges, some overcome and others irremontable that remain as an absolute, sometimes deadly setback (illness, death from macho violence, survivor trauma, discrimination and homophobic violence, racism). It is worth mentioning that "The Caribbean Voice of Football" offers a list of verbal forms of xenophobic and racist aggression, regarding the performance of the referee functions of Venezuelan Jorge Castañeda, who lists them as an inherent challenge to his profession.

Olea also violates other conventions of the graphic chronicle. Despite the different emphasis on the outcomes of the stories and their milestones, Olea maintains in all the chronicles the colors blue-gray and black that determine a somber psychological atmosphere, permanently and transversely to all the stories without marking narrative rhythms.

In short, the graphical chronicles oscillate between the discourse of difference and that of authority. In most stories, the role of government is reduced until it vanishes in the face of the cultural fabric in which lives unfold. The exceptions are the last chronicle of the series, "The War and Peace of Nadda Hamlawi" in which even the figure of Michelle Bachelet appears

welcoming to Chile the Iraqi family who left a refugee camp while noting "I was also a refugee" (Figure 1).

Figure 1
Chronic Start "The War and Peace of Nadda Hamlawi"

Note. Twitter Magazine Sábado (08.10.2018).

The story "The Haitian Carabinero" features a Haitian policeman who gets a scholarship to study at the Carabineros de Chile for four years and also illustrates government actions to welcome migrants. Nadda Hamlawi's story reinforces the idea of migrants' dependence on the government's actions in public discourse.

Literary strategies of visibility in the graphic chronicle: voices, places and portraits

Among the elements consigned for the graphic novel appropriate for the graphic chronicle, the use of testimony is central to meeting the challenge of personalizing the protagonists and restoring their voice in the narration of their own experience. The graphic chronicle boasts of restoring the voice of the excluded. However, it is a mediated testimony (Acedo, 2017). The linguistic gap required by a translator (in the case of Nepali and the Iraqi family) is one modality, but it is also considered in the double administration of the testimony made by the author of the script, and then the cartoonist when preparing the graphic chronicle.

The testimonial voice of the migrant also coexists with the witness voice of the journalist/author, who describes the protagonists and their environments, shares his thoughts on the experience of being a refugee and delivers information to contextualize the microstories within historical, political, economic structures. This particular feature of the graphic novel has been appropriate within the plurivocality strategies of the graphic chronicle.

In "My life as an immigrant in Chile" there are no indications of the presence of the authors, who usually appear contributing with the historical, socio-political and economic context that situates the experiences of mobility, conferring to the narrative part of the authenticity of the journalistic tone. There are also no elements to determine the physical resemblance between the portraits drawn and the protagonists of the stories, but it would not be necessary to assume that there are differences (except for the case of the Venezuelan referee in "The Caribbean Voice of Football" already noted).

In most of the chronicles there are visual elements that allow the associations of the characters to recognizable geographical locations (view of Kathmandu, Riyadh, San Carlos sugar mill camp, the highland desert, San Borja bus terminal, Iquique, San José mine, Baghdad, refugee camp on the border of Iraq and Syria). However, it is striking that in the two stories about Haitians there is no mention of identifiable places like in the story of Silvia, the Bolivian woman killed in Melipilla by her partner who left two orphaned children in Chile. In the chronicle "The Nightmares of Mamani", Bolivian miner survivor of the collapse of the San José mine, it is indicated that he is born in La Paz, but there are no visual guides to his life in Bolivia and only the image of Evo Morales is presented as part of his traumatic dreams. A bias

is observed for exotic places and local/national reference spaces. Haiti and Bolivia are two hazy, ghostly references in which the synecdoche works and mentally complete what is incomplete.

The figure of an Afro-descendant man carrying a backpack, presumably Haitian, illustrates the cover of the book and does not correspond neatly to any history of the chronicles. His face is not recognizable in any chronicle. The backpack could be connected to the "Ashes of Esaü", the only story in which the protagonist wears a backpack. The ambiguity of the cover can be understood as a synecdoche or metonymic operation on the migrant population (Figure 2).

Figure 2
Cover "My life as an immigrant in Chile"
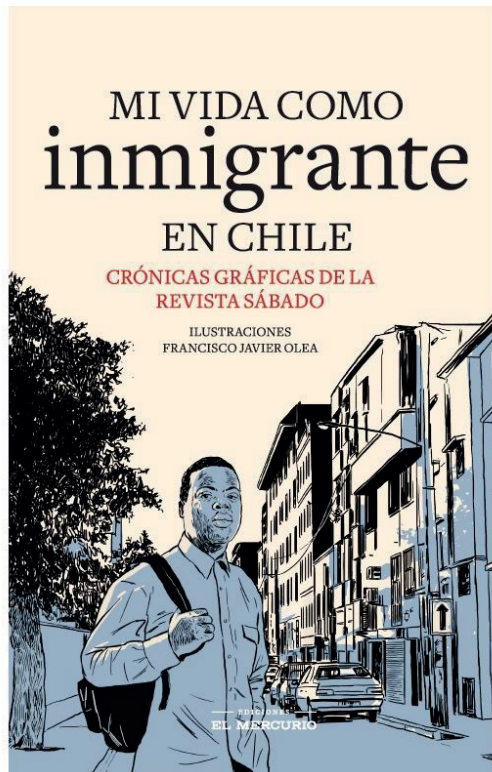
Note. Editorial El Mercurio (2018).

The aforementioned elements operate simultaneously as a stylistic verb-visual resource and documentary proof that it provides with verisimilitude, and that is diminished in its authenticity in the graphic chronicle. Similarly, there are no mechanisms to indicate the meta-narrative level of the comic.

Finally, it should be mentioned that the structure of migration narratives is commonly divided into the three main stages of displacement: origin, journey, and destination. Throughout "My Life as an Immigrant in Chile," most stories feature this structure while only two omit origin and journey focusing solely on destiny ("Drops of Blood in Melipilla," "The Ashes of Esaü"). This hiatus again suggests the presence of a bias for these two experiences, one of gender and the other racialized ("black migration").

It is worth asking for that invisible/visible dimension that the graphic chronicle tries to document and that differentiates it from the conventional migration journalistic report.

The Human Rights Approach in the Graphic Chronicle

One of the characteristic resources of the graphic novel of migration that addresses the phenomenon from the perspective of human rights is the staging of the vulnerability of migrants. In "My life as an immigrant in Chile" the stories of "defeats" present the fragility of the protagonists, reaching the apex with "The ashes of Esaü", focused on the priest's willingness to repatriate the remains of the young Haitian man killed in a bronchial painting, and "Drops of blood in Melipilla" that relates Silvia's courage to face her abusive partner who kills her, but the story turns its attention to the figure of the neighbor on the first floor who witnessed for a long time this "announced death" and is reprimanded by the community for not denouncing the fact.

Silence is a repeated element in the migration narrative, associated with the migrant who is silent in the face of aggression ("The Caribbean Voice of Football"), who does not speak to avoid recognition as a foreigner, who does not communicate because he does not know the language ("A Nepali Lost in Paine"), who uses his "right to remain silent" in front of the police. Silence is always there, and can be channeled into positive or negative narratives about migration, so it also signals resilient resistance. "The War and Peace of Nadda Hamlawi" portrays an Iraqi-Palestinian refugee girl in Chile who lived through the trauma of exile and in her teens and youth has been a volunteer interpreter for Iraqi families who came to Villa Alemana while wor-

king preparing Arab cakes and sweets. Nadda Hamlawi's story was awarded in 2018 by the Communication and Poverty Alliance which seeks innovative ways to tell stories of overcoming and vulnerability.

"The Journey of a Filipino Nanny" is less a tale of resilience than of adaptability and accommodation of a woman who transits between trades and geographies. Elen Embold's life is spent between Manila-Saudi Arabia-Santiago, and from being a hairdresser she goes into domestic service, marries a Korean, and eventually becomes an entrepreneur with a Filipino migrant placement company. In this narrative, the cultural plot of the radical Islamic world predominates over women from the perspective of the Filipino migrant subject to the network of family care that is hired in Saudi Arabia, and who already in Chile does not manage to accept the liberal view of the West on the body of women, among other aspects of daily life in confrontation.

The ways of testimony that leave room for personal reflections and intimate thoughts of migrants is the resource used in "The Dirty Years of Professor Rueda", in which a former Chilean footballer recalls the time when he played in a local club in Colombia under the direction of coach Reinado Rueda in the penetration of narco-culture in football activity. The memory of each narrator offers a point of view, a particular style to collect the experience of the other to an identity erased from the story that is saved, that becomes memory and is also memorized mediatically.

Conclusions and discussion

"My life as an immigrant in Chile" moves between the folds of authorized discourse and discourse of difference on the phenomenon of human mobility, collecting the migratory media content and deepening less on the expressive possibilities of the hybrid and composite characteristics of graphic narratives. The double administration of the testimony is an attribute of these composite narratives that challenges the analysis of the chronicle of the final product, where the traces of the division of functions in the collective production are followed, in which the tasks of the cartoonist are separated from those of the journalist who carried out the investigation and elaborated the script. Having the journalistic chronicles prior to the graphic version would allow us to compare both narratives and observe the elements that remain and the points of flight or divergence.

From the perspective of memorialization, it is the visible dimension of human mobility that the graphic chronicle collects that remains and is supported by the media while the hidden part of the social phenomenon of migration remains invisible, in which it is seen how individual decisions are produced, how and what the intervening subjective factors are, the impact of structural conditions on the decisions and the direction they adopt, the individual differences in front of the same problems, and the force that it possesses in the definition of behaviors, imaginaries and mentalities. Migrants' stories form a contradictory social and personal memory, balancing aid, control, self-reliance, and mistrust. The memorialization of migration through graphical narratives and their verb-visual strategies could introduce the ambiguity and ambivalence of migration experiences, as well as the relationship with the "distant next". On this point, it is possible to return to Manuel Callejo when referring Luhman, remembering that "what we know we know it through the mass media, also what we remember or will remember. With this in mind, the media tells us what is meant by the future and what is past. Journalism itself is a time marker" (Callejo, 2015).

In the graphical chronicles of migration of Sábado Magazine, no fantastic elements are suggested that break the expectation of a realistic narrative, however, the resources of authenticity also become hesitant in the first stories, reaching consistency in the final chronicle ("The war and the peace of Nadda Hamlawi"). The absence of fantastic elements, and also of symbolic resources referred to the experience of human mobility reduces the possibility of identification of the reader and the appropriation of the migratory phenomenon from their own experience. In the graphic novel of migration, this resource bursts with force creating exemplary stories such as "Emigrants" by Australian Shaun Tan (2007), where migration confers power to history, based on repetition and taking charge of the stereotype, circulation, cyclicality and universalization of experience, this set is assumed as the expression of migration displacement and assimilation from the point of view of Western civilization (Ahumada, 2020). Shaun Tan has also explored the interspecies crossing in "Cigarra", with an allegory about the intersubjective play between people and non-human life in the framework of consciousness about the Anthropocene. Tan's off-center approach mentions all that is forgotten, stripped, abused, marginalized (Corbetta, 2021).

Likewise, the meta-narrative in the graphic chronicle is part of the "testing area" to superimpose modes of representation and expression of both

migrants and the author of the chronicle, exhibiting ways of interacting with others that reverse exclusion (Toffano and Smets, 2023), as observed in the graphic novel "The Odyssey of Hakim" by French Fabien Toulmé (2018) response to the Euro-Mediterranean migration crisis of 2015. The relationship between aesthetic devices and the formation of solidarity is tested in their graphic narratives (chronicle and novel), as they may be able to create a kind testimonial space for the experiences of migrants and refugees (Boum, 2021). Toulmé is also constantly questioned about the ethical dimension of such chained devices in transcription and then linguistic translation and the transition from text to image.

The graphical narratives of migration return to the topic of life stories where the introspective gaze, the subjective point of view and the exercise of memory and reflexive awareness about what has been lived are legitimate and fundamental for expanding the understanding of the problem as a support for the action on it. The graphic novel also acts as a support for new media functions that favor the participation of diverse social organizations that produce graphic narratives to participate in the public debate on the subject, opposing the public discourse on migration, narratives that have not yet been studied enough and that open a rich field of exploration on intermediality in the construction of representations, imaginary on human mobility and social innovation (Bettaglio, 2021).

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MISCELLANEOUS

MISCELÁNEA

Violence against women, a systematized review

La violencia contra la mujer, una revisión sistematizada

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Abstract

Violence against women is a serious public health problem, with a marked social and economic impact. The objective of this article is to synthesize the theories that explain violence against women, contributing, from a theoretical perspective, to the understanding of risk factors. The research is basic and descriptive; the analytical-synthetic method was used to establish the essential elements of the information collected and formalize conclusions in this regard. The search for bibliographic sources was carried out in the Google Scholar database. Theories such as the cycle of violence, traumatic union, paradoxical punishment, battered women, among others, are presented. In addition, the importance of factors such as poverty, victimization, dysfunctional families, ineffective educational and judicial systems is recognized. Risk factors for gender violence were identified according to the different theoretical positions analyzed. The conclusions recognize the conduct of a significant amount of research on violence against women in the context of the pandemic. The proposal of theoretical foundations for each of the risk factors was made, which contributes to future research, especially in the Latin American space. It is considered that theories must be understood within the very dynamics that this phenomenon presents, focused on the variety of criteria, elements, variables, causes, consequences, conditions, etc.

Keywords

Violence, gender, theories, risk factors, relationships, social sciences, learning, communication.

Resumen

La violencia contra la mujer constituye un grave problema de salud pública, con un marcado impacto social y económico. El objetivo de este artículo es sintetizar las teorías que explican la violencia contra la mujer, contribuyendo desde una perspectiva teórica a la comprensión los factores de riesgo. La investigación es básica y descriptiva; el método analítico-sintético se utilizó para establecer los elementos esenciales de la información recopilada y formalizar conclusiones al respecto. Se efectuó la búsqueda de fuentes bibliográficas en la base de datos Google Scholar. Se presentan teorías como el ciclo de la violencia, la unión traumática, el castigo paradójico, la mujer maltratada, entre otras. Además, se reconoce la importancia de factores como la pobreza, la victimización, familias disfuncionales, sistemas educativos y judiciales poco efectivos. Se identificaron los factores de riesgo para la violencia de género según las distintas posiciones teóricas analizadas. Las conclusiones reconocen la realización de una cantidad importante de investigaciones sobre violencia contra la mujer en el contexto de la pandemia. Se realizó la propuesta de fundamentos teóricos para cada uno de los factores de riesgo, lo que contribuye para futuras investigaciones, sobre todo en el espacio latinoamericano. Se considera que las teorías deben comprenderse dentro de la propia dinámica que presenta este fenómeno, centrados en la variedad de criterios, elementos, variables, causas, consecuencias, condiciones, etc.

Palabras clave

Violencia, género, teorías, factores de riesgo, relaciones, ciencias sociales, aprendizaje, comunicación.

Introduction

Violence against women (VAW) is a serious health problem and a violation of the human rights of this group of people. 30% of women have been abused by someone else at some point in their life (World Health Organization, 2021). A significant number of these violent acts are committed by their partner or ex-partner. There are multiple ways of exercising violent against women, related to the lack of equality, opportunities and rights, wage discrimination and, in some cases, it comes from the State that does not guarantee equity in access to power.

VAW affects their reproductive capacity, as well as their physical and psychological health, especially when they are victims from an early age; it generates behavioral patterns that make them submit to situations similar to

those that they lived in their childhood and adolescence. Many women are victims of homicides and murders, others go as far as suicide to escape the situation of violence in which they live (Huisman, 1996). The abuse and assault of women by their partners has increased over the past three years. The involvement of this social phenomenon has increased dramatically in recent decades, due to the lockdown caused by the COVID-19 pandemic worldwide.

VAW has existed throughout history; however, there is enough evidence to know it is increasing worldwide today. For the World Health Organization (OMS, 2021), it can be unequivocally stated that violence against women is on the rise and widespread in the world. It is a problem with a global impact that affects a significant number of women and requires immediate solutions from all possible sides of intervention: public, state, sectoral policies, legal strengthening, speed in confronting and solving cases, community intervention, school, family, professional mental health services, etc.

Article 1 of the Declaration on the Elimination of Violence against Women recognizes that violence against women is:

> Any act of violence based on female membership that results in or may result in physical, sexual or psychological harm or suffering to women, as well as threats of such acts, coercion or arbitrary deprivation of liberty, whether occurring in public or private life. (ONU, 1993, p. 1)

VAW can be within the family, within the community, or committed by the state. This very multilateral body has established a series of mechanisms, agreements, resolutions and meetings to address this social problem that affects all continents significantly.

VAW is a specific type of deviant behavior that is committed by the specific gender condition. Gender violence includes, in addition to violence against women, the investigative treatment of aggressions to the LGBTIQ+ community, presents historical and contemporary nuances, areas and characteristics that are not taken into account in the theories used in this article, so the study focuses on violence against women, because of their gender condition.

This article aims on making visible the importance of recognizing the theoretical support of VAW research, which allows to set aside traditional and reductionist positions that have characterized it as a phenomenon associated with psychopathological disorders of the aggressors and the lack of social skills of the victims. Therefore, the objective is to identify the theories that explain violence against women, contributing from a theoretical perspecti-

ve to the understanding of risk factors. This in turn will enable the design of more effective prevention strategies aimed at vulnerable groups in this type of violence (Saavedra, 2022).

It is important to narrow down the scope and limitations of the analysis that is proposed. Specifically, it is related to VAW and not all crimes of gender-based violence. In addition, the theories respond to the area of knowledge of the social sciences, taking on particular cognitive meaning, since their support is found in court cases that have been analyzed by professionals who will serve as experts specialized in courts and hearings.

This article is an effort to make the problem visible and provide knowledge for its prevention. The theory helps to better understand social phenomena; at least, they contribute to explaining a part of them; they provide solidity to the empirical findings and contribute to making explanations and predictions according to the scientific principles and assumptions that support them. Theoretical proposals make it possible to argue about VAW, its characteristics, regularities and implications.

Materials and method

A theoretical and documentary research was carried out, recognizing that the analysis is carried out from primary theoretical sources of scientific information (Hernández *et al.,* 2014). It is pure basic research because "it is carried out within a theoretical framework to increase scientific knowledge, without the need to contrast it with any practical aspect" (Muntané-Relat, 2010, p. 221). The level of knowledge obtained is descriptive, since a logical-epistemic-retrospective study of the theoretical background of violence against women is developed. The analytical-synthetic method is predominantly used to establish the essential elements of the information collected and make conclusions about it.

The procedure proposed by Saúl *et al.* (2012) has been used to collect and analyze the information. This procedure proposes to search the data from the delimitation of the criteria of consultation and discrimination of sources (Muntané-Relat, 2010). The consultation criterion used was the theory of violence against women. Primary sources of recognized academic prestige were used (Sánchez-Meca *et al*., 2011). Among the limitations of this study

is that it does not intend to hierarchize or value each of them individually, but tries to show its most significant elements (Morocho and Calle, 2021).

The search was carried out in the Google Scholar database using as filters the date of publication of the last five years, mostly articles in Spanish were used. The criteria for inclusion of the articles are:

- To be a peer-reviewed scientific journal article.
- The format used in the publication can be digital or printed.
- The research contained in the article is empirical in nature.
- It can be conducted by authors of any nationality.

The following were used as exclusion criteria:

- To be a manuscript published as a memoir of the congress.
- To be a theoretical article.

Initially, 178 articles were identified from the search. Duplicates were removed, and the initial number was reduced to 144. Then a screening process was performed, using the CASP-e methodology as a quality indicator. The number of articles that were part of this systematic review is 32.

The main reasons for discarding items are related to the following criteria:

- 34 articles are duplicated (obtained from different databases).
- 50 articles are theoretical or respond to intervention designs, so their main contributions are not useful for this study.
- 38 items do not allow the precise identification of sample elements (size, type, selection criteria).
- 24 articles do not allow to identify elements of the methodology used (applied instruments, methodological strategy).

Results

Epidemiological data on violence against women

According to OMS (2021), VAW by an intimate partner is a serious public health problem and a violation of their human rights. The agency's global estimates that one in three women have experienced some form of violence,

most of it by an intimate partner. This type of violence affects women's physical, psychological, sexual and reproductive health. Estimations of this type of violence are increasing in all geographical areas (Pérez and Trigozo, 2021).

The COVID-19 pandemic has created an enabling environment for VAW at home. The global lockdown implemented in 2020 and part of 2021 led to higher levels of stress in families and an increase in unemployment, increasing precariousness in households. In addition, access to women's protection services, public health services, the functioning of police and judicial institutions were reduced (OMS, 2020).

Main consequences of violence against women

The consequences of VAW are evident on all sides of victims' lives. Most authors recognize that injuries can be classified into physical, psychological, and social. The most common physical injuries found in women victims of violence are: contusions, stab wounds, firearm wounds, scuffs, bruises, and superficial wounds on the face, neck, head, breasts, and abdomen (Muelleman *et al.,* 1996). Other injuries can be found near the genital organs such as bruising and ecchymosis if the victim suffered sexual abuse.

Among the main psychological consequences for victims of VAW are adaptive disorders, acute stress disorders, post-traumatic stress disorder. Other symptoms that appear after violence are: anxiety, depression, startle reactions, negative perceptions of health and behavior, alcohol and drug use, anger, guilt, among others. Also, the loss of self-esteem, the effect on the meaning of life and future projections.

From the social point of view, the most studied consequences have been the change in personal interrelationships; avoidance behaviors and isolation. However, it is considered that the main psychosocial effects are linked to the loss of support from family and friends, all of which will generate the lack of protective factors against the risk of experiencing this violence.

The risk factors recognized by OMS (2021) as generators of violence against women must be taken into account when designing programs for intervention and/or prevention of this type of abuse. The risk factors are conditions (not self-sufficient, but with the capacity to influence), which generate situations of aggressiveness against women. The presence of any of them should attract attention to prevent abuse and aggression against women by their partner, employer, doctor, or any member of society (Morocho and Calle, 2021).

Table 1 presents the different risk factors presented by OMS (2021) related to theories and research that support these criteria, especially in the Latin American context.

Table 1

Risk factors recognized by OMS (2021)
and their relationship with other authors

WHO risk factors (2021)	Authors' proposals
Low level of education (perpetrators and victims of sexual violence).	Velasquez *et al*. (2019) Fabián *et al*. (2020)
Exposure to child abuse (perpetrators and victims).	García & Mendoza (2018); Méndez *et al.* (2022)
Witnessing scenes of domestic violence (perpetrators and victims).	Garcia and Calle (2021)
Antisocial personality disorder.	Morales (2022)
Harmful use of alcohol.	Morillo *et al.* (2021); Avilés (2021)
Harmful male behaviors, such as having multiple partners or condoning violence attitudes.	Soledispa-Saltos and Rodríguez-Álava (2021); Durán, and Patiño (2021); Silva (2021)
Cultural norms that grant privileges or superior status to men and inferior status to women.	Parra (2021); Saavedra (2022); Villa-Rueda *et al.* (2022)
Women's limited access to paid employment.	Pérez and Valdelamar (2020); García (2021); Seminario-Córdova and Paredes (2021)
Limitation on laws based on gender equality (discriminatory laws, etc.).	Zaikoski (2018); Thill (2019); Cevallos (2021)
History of violence.	Morán (2019); Enríquez *et al.* (2020); Morocho and Calle (2021)
Difficulties of communication between the members of the couple.	Carrascosa *et al.* (2018); Carrascosa *et al.* (2019)
Marital fights and dissatisfaction.	Camacho (2020); Pérez and Trigozo (2021); Aliaga e Infante (2021)
Belief in family honor and sexual purity.	Gómez (2018); Thill (2019)
Ideologies that perpetruate man's sexual privileges.	Vega (2018); Santana and Caballero (2020)
Insufficient legal sanctions for sexual violence.	Zaikoski (2018); Gómez (2018); Cevallos (2021)

Explanatory theories of violence against women

With the theoretical and methodological advance in psychological, sociological, anthropological investigations, from an integrative approach of the social sciences, it has come to eliminate the belief that the cause of VAW depends on the personality and behavior of the abuser. The analysis of VAW at the individual level leads to the use of a psychiatric model, where explanations based on mental disorders, alcohol and other harmful substances, personality disorders, etc. prevail (García, 2016).

This idea remained for decades in the social imaginary and the academic community did not conduct studies to contrast this belief. Therefore, the psychopathological perspective of the aggressor became the first theoretical reference of VAW. This is also a consequence of the recent rise of Forensic Psychology, and the importance it has devoted to this particular type of violence. However, a thorough analysis highlights the importance of valuing the influence of the environment and social institutions such as family, friends, etc.

The perspective of psychosocial analysis is oriented towards the search for environmental factors such as stress, learning, family structure and the transmission of intergenerational violence. The latent intersubjectivity in VAW goes beyond the pathological limits and is structured in part by psychosocial components such as mental representations, beliefs, norms, and other components of organizational culture. Family breakdown and dysfunction began to be analyzed as a cause of VAW.

The perspective of sociological analysis emphasizes the influence of social inequality, poverty, marginality and patriarchy on VAW. It is influenced by the so-called ecological or bioecological model, where the State and social control mechanisms play a decisive role in confronting attacks against women. The role of education and community in providing alternative behavioral patterns to male chauvinist culture is being considered.

In the definition of VAW, most international bodies agree on the main arguments. García (2016) argues that VAW is:

> A coercive pattern of conscious and intentional behavior that, by action or omission, manifests a family member causing harm or threat of physical harm to another, repeated psychological abuse, sexual assault, progressive social isolation, deprivation, intimidation or economic coercion. (p. 155)

VAW in the couple should not be seen as isolated or casual. The cycles of violence are based on theories of traumatic union (Dutton and Painter, 1981), paradoxical punishment (Long and McNamara, 1989) and intermittency (Dutton and Painter, 1993), which hold that in the couple's relationship there is an intermittency between good treatment and bad treatment. All of them emphasize that VAW does not arise suddenly, "but is usually the result of a more or less prolonged process that begins with abusive behaviors and that subsequently increases in intensity and frequency" (Álvarez *et al.,* 2016, p. 34).

The cycle of violence (Walker, 2012; Palop, 2019) consists of three phases. The first is the stress accumulation phase. It characterizes by the increase in hostilities on the part of the aggressor, especially from the verbal and psychological point of view, although physical violence may exist; intimate partner conflicts begin, and the woman fails to explain the situation; she even justifies this behavior. The behavior of the woman is submissive and blamed for the situation.

In the explosion phase there is an intensification of physical and sexual violence, accompanied by verbal and psychological attacks that may peak. This stage is usually when help is sought, and the relationship stops. The woman experiences significant physical, sexual, and psychological injuries. In the reconciliation phase, the aggressor makes every effort not to leave his victim, expressing regret and making promises and strategies of emotional manipulation. Throughout the cycle, violence is increasing (Jáuregui, 2006). Over time, the cycle of violence returns, this time with an increase in assaults and injuries that are caused to the woman.

The abused woman theory (Walker, 2012) describes the symptoms that women exposed to long-term violence can develop. The author states that VAW increases aggressiveness gradually and in a staggered manner. The first signs of violence were verbal assault and emotional abuse, as well as small signs of physical assault, such as slapping or squeezing of limbs. The woman acts with passivity, reinforcing the aggressiveness of the abuser. Over time, aggressive behavior becomes more acute. The abuser could express his intentions to change and maintain conciliatory behaviors.

Social learning theory recognizes that a person who has been a victim or exposed to behavior patterns of domestic violence is more likely to commit abuse and assault against women in the family environment. The family has not become a space for conflict resolution, decision-making and assertive

communication among all its members. Therefore, the models of violence put into practice in the family are learned by its members (Bandura, 1973). It intervenes in tolerance towards violence (Gelles, 1972; Finkelhor *et al.,* 1988). In the family environment, the conditions for the development of both a future victim and a potential aggressor may be created. The evidence of intergenerational violence allows to affirm this theory, since in homes where violence was experienced, they have generated new violent subjects (Gelles, 1972; Browne, 1993; Walker, 2012).

From the theory of stress and coping with social situations, the situational analysis of VAW is proposed, based on the presence of situations that trigger it as a behavioral pattern. This type of violence is associated as a result of two essential factors. On the one hand, there is structural stress and lack of coping resources in the family nucleus. For example, the relationship between precarious socioeconomic conditions and family and/or gender-based violence. On the other hand, there is the use of force, aggression and violence as a cultural norm in certain societies (Straus *et al.,* 1980).

The systemic theory of gender violence uses the social system model as a support (Giles-Sims, 1983). The understanding of VAW moves away from the individual and pathological explanation, to commit to obtaining alternatives or channels of action other than violence. It also focuses on enunciating the need for feedback from the VAW system, as well as, the fulfillment of objectives by the aggressor.

The resource theory of domestic violence is based on a sociological position that all institutions and social systems depend, to some extent, on the force or threat. In this case, force is related to the control of economic, social and personal resources (Goode, 1971). Individuals who need to maintain a dominant position in the family, but lack access to these resources, could resort to violence as a means of imposing their domination.

The theory of exchange is grounded in the economist's cost-benefit stance. Part of the recognition of the theory of rational action where human actions will always be evaluated from the effort that must be made and the benefits that are obtained from its realization. Therefore, VAW will be used as long as the benefits of doing so outweigh the costs. Given the low rate of reporting of these crimes, the reactive role of public institutions on these issues, and the inadequacies of the regulatory legal framework, the costs presented to the aggressor are really low. The most significant reward is family power and control.

Patriarchy theory focuses on the explanation of the need for a patriarchal social order to do economic and social processes. When applied to the family, this theory points out that it leads to the submission and historical oppression of women at the hands of men. This dynamic has given rise to historical patterns of abuse and violence against women, who have been perceived as inferior beings, means of exchange, sexual objects, among other roles (Dobash and Dobash, 1979). This perspective uses the social structure to understand violence directed towards women.

Violence is also perpetrated by women, although to a lesser extent than men. However, it cannot be said that gender-based violence is exclusive to men just because women do not have such a relevant presence as aggressors (Stemple *et al*., 2017; Mgolozeli and Douma, 2019). The integrative theory of gender-based violence is a perspective that includes all possible determinants of violent behavior. García (2016), refers it is used to explain domestic violence, of which violence against women is part.

Conclusions and discussion

One of the most relevant social science studies on VAW was conducted by the Metropolitan Police of London (Richards, 2003). This investigation revealed three critical moments in which VAW tends to increase. The first is the moment of separation. The study indicates that the first two months after the break-up of the relationship are decisive, since a significant number of homicides against women by their partners occur in this period. The threats must be taken into account, since the coping and adaptation mechanisms are adjusting.

Pregnancy and the birth of a new child can lead to the emergence or intensification of abuse, due to the vulnerable situation experienced by the future mother. Gelles (1988) argues that there was a 30% higher risk of violence for a pregnant woman compared to one who is not pregnant. Therefore, changes in family dynamics resulting from the pregnancy and birth of a new child can become a stressor for the aggressor and start or increase acts of violence against women.

A third significant element found in the London Metropolitan Police study (Richards, 2003) was the escalation phenomenon. This has been described as increasing the frequency and intensification of attacks against women.

According to Sonkin (1987), men who committed violent behavior with previous partners or the current partner are more likely to commit such behavior in the future; whereas women who are victims of VAW will be more likely to be victims of this type of violence again than of other types of aggression.

Another topic of analysis from the perspective of behavioral sciences is the relationship between animal abuse and violence against women. The Arkow (1997) criterion that identifies a correlation between cruelty to animals and VAW is shared. In many cases, the mistreatment of pets is used as a sample of what the aggressors can do against other people in the family, especially against women. According to Ascione (2007), when conducting a study with women residing in shelters to prevent abuse, 57% said that the aggressors had assaulted their pet.

Studies addressing the relationship between unemployment and VAW have been found. Job loss and economic stability are a risk factor for intimate partner aggression. According to Stuart and Campbell (1989), unexpected changes in job stability may be associated with an increase in VAW. Other studies also refer to the relationship between alcohol, drug, and illicit drug use and its relationship to violence (Stuart & Campbell, 1989).

An important and little analyzed aspect, especially in the Latin American context, is the so-called reciprocal violence. Currently, an important research group on VAW has identified a type of violent reciprocity behavior between men and women, which has not been fully analyzed or applied in social science arguments. The perception that intimate partner violence is one-way (male mistreating female) is not met, at least, in all cases of assault. Archer (2000) has stated that women can become even more violent than men. In Spain, it is recognized that men have also experienced fatalities of their female partners. Women may be equally prone to intimate partner abuse, although they are more likely to be injured (Archer, 2000). In reference to this study, it was determined that women are more likely to slap, throw objects, bite and kick (54.8%) than men (45.2%); while men (69.5%) are more likely to repeatedly beat and even cause death than women (30.5%).

In research conducted by Muñoz-Rivas *et al.* (2007) in a Spanish university, it was possible to observe that both men and women admitted to having carried out violent behaviors towards their partners, such as: pushing, grasping with force and pinching. Therefore, violence as a dynamic of intimate relationships varies depending on the sex of the aggressor and the victim, the age, the type of violence used (verbal, physical, psychological, sexual).

The impossibility of leaving the relationships of the woman victim with her abuser is explained from several theoretical positions.

- Abused woman syndrome, based on the abused woman theory (Walker, 2012), works in a similar way to Stockholm syndrome, in this case, the permanence relationship between the hostage and her abductors.
- Paradoxical adaptation syndrome (Montero, 2001). The victim accepts the excuses and arguments of her aggressor, withdraws complaints, tries to restore family harmony, does not inform family, friends or authority, or tries to seek specialized help.
- Presence of feelings of guilt, coping strategies related to denial, submission, avoidance and passivity, emotional or economic dependence (Sepúlveda, 2005).

The data provided by international organizations indicate the increase in cases of VAW, favored by the context generated by the pandemic, the difficult economic situation, the maintenance of the macho culture, the low effectiveness of public policies, the low efficiency of social control mechanisms and the low impact of educational and community processes. This reality supports the importance of research on this type of aggression from the theoretical, methodological, instrumental and practical perspectives.

The risk factors associated with this type of behavior have been analyzed by various international institutions; which must be analyzed from a systemic and comprehensive perspective. The proposal of theoretical foundations for each of the risk factors proposed by OMS (2021) was made, which contributes to future research, especially in the Latin American context.

The theoretical positions that explain the phenomenon of VAW are diverse. The contributions of the social sciences help to identify the foundations that enjoy greater recognition within the academic community and the organs of justice. This article does not disregard any of them; it is considered that all must be understood within the dynamics of this phenomenon, focused on the variety of criteria, elements, variables, causes, consequences, conditions, etc.

It is important to know the increased risk of VAW in cases of pregnancy, relationship breakdown without social support, loss of employment, substance use, violence against pets, prolonged periods of confinement. These factors should be analyzed in the context of the couple, and not from one of their members.

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It is recommended to promote research where theories can be applied, to carry out meta-analytical studies and to systematize the most relevant results. It is considered that the relationship between violence against women and other types of violent behavior is little addressed by these theories, so it is recommended to develop this line of research in the future.

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Reconstructing the field of studies on Public Policies evaluation at Spanish public universities

Reconstruyendo el campo de los estudios en evaluación de Políticas Públicas en las universidades públicas españolas

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Abstract

In January 2023, the Law for the Institutionalisation of Public Policy Evaluation in the General State Administration came into force in Spain. This law takes an important step by establishing the evaluation of public policies (EPP) as an instrument to improve the effective and efficient use of public resources and to make the decision-making process more transparent. This requires trained personnel to carry out evaluations. The aim of this article is to present how university education in EPP is structured in the public universities of Spain and how the various university degrees linked mainly to Political Science incorporate courses on public policy analysis and evaluation. Based on the observation and analysis of the presence of these courses in universities, this study shows in the development of political science studies, EPP is at an incipient stage, this being a relatively young approach in Spain within the realm of Political Science and partially limited to a few universities. The proportion of academic credits in public policy analysis and evaluation out of the overall volume of courses is marginal. This implies that in terms of the skillset attained at the end of university education and its transfer to the workplace, it vastly depends on certain universities and the completion of their coursework.

Keywords

Evaluation, policy, publics, professionalization, institutionalization, university, studies, Spain.

Resumen

En enero de 2023 entró en vigor en España la Ley de Institucionalización de la Evaluación de Políticas Públicas en la Administración General del Estado. Esta ley da un paso importante al establecer la evaluación de políticas públicas (EPP) como elemento para mejorar el uso eficaz y eficiente de los recursos públicos y dotar de una mayor transparencia al proceso de toma de decisiones. Para ello es necesario contar con personal capacitado para realizar las evaluaciones. El objetivo de este artículo es presentar cómo se estructura la formación universitaria dentro de las universidades públicas españolas en EPP y cómo los diferentes grados universitarios vinculados mayoritariamente a la Ciencia Política introducen la formación en análisis y evaluación de políticas públicas. A partir de la observación y análisis de la presencia de estas formaciones en las universidades, este estudio muestra cómo la EPP se encuentra en una fase bastante incipiente en el desarrollo dentro de los estudios de ciencia política, siendo un enfoque relativamente joven en España dentro de la Ciencia Política y parcialmente limitado a unas cuantas universidades. El volumen de créditos formativos en análisis y evaluación de políticas públicas sobre el total de la formación es marginal. Esto significa que, en términos de competencias alcanzadas al final de la formación universitaria y de la transferencia de esos aprendizajes al puesto de trabajo, depende de la realización de la formación universitaria en determinadas universidades.

Palabras clave

Evaluación, políticas, públicas, profesionalización, institucionalización, universidad, grados, España.

Introduction

Public policies have a direct impact on society beyond the effects on the beneficiary population. The levels of well-being of our society are modulated by the effectiveness of the public policies developed (Stufflebeam and Shinkfield, 2007). The analysis and evaluation of the different public policies is a central issue that influences the quality of life to the extent that it can help us to know if these social policies (or any other public policy) respond to the needs that shaped their origin (Bustelo, 2020; Casado and Del Pino, 2021). And, ultimately, public policy evaluation (PPE) is a symptom of a healthy democratic system (Blázquez & Alarcón, 2018).

At present, there is an academic and professional consensus on improving the actions of the public administration by incorporating evaluation tools in

the action of government and management of policies and public administrations (Subirats, 2005). This consensus has materialized in the approval at the end of 2022 of the Law on Institutionalization of the Evaluation of Public Policies in the General Administration of the State.[1] The project entered the Cabinet in May 2022 and was sent to the Congress of Deputies for urgent processing. The regulation is part of one of the commitments made under the Recovery, Transformation and Resilience Plan, and aims to shape and boost PPE in a framework of modernization of the Spanish public administration.[2]

The regulation establishes a framework for action and reestablishes the State Agency for Public[3] Policy Evaluation in charge of supervising the EPP at the state level, coordinating the evaluation structures present in each ministry. It will also identify which policies will be evaluated and which will be included in biennial evaluation plans. It provides that the evaluation will be external, in general, although it allows the creation of joint evaluation teams. As for the training of evaluators, Article 16 states that the aforementioned agency, in collaboration with the National Institute of Public Administration (INAP) and, where appropriate, with the Institute of Fiscal Studies, will identify the necessary competencies for the performance of the EPP and design specific training plans for public service personnel.[4]

Regardless of the origin of the evaluation team (external or mixed) and the identification of the necessary competencies for PPE, there is the need for trained and specialized personnel in PPE who are able to carry out the entire evaluation process successfully (Martínez, 2023). There are different approaches in the process, and many types and designs that require specialized knowledge that endows the PPE rigorously and impartially. PPE training is required from two angles. A first, which should focus on the training of the evaluator or the staff performing the evaluative assignment, both require training or expertise in PPE, and in the second angle, on the importance of

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1   Law 27/2022 of December 20, on the institutionalization of the evaluation of public policies in the General Administration of the State, published in Official State Gazette number 305 of Wednesday, December 21, 2022.

2   For a retrospective of the evaluation process in the context of Spanish public policies see Arriazu (2015) and Casado and del Pino (2021).

3   Previously we were, still when writing this manuscript, with the Institute for the Evaluation of Public Policies (IEPP) that was heir to the State Agency for the Evaluation of Public Policies and Quality of Services (AEVAL). The AEVAL was created in 2006 and disappeared in 2017 in favor of the IEPP.

4   The National Institute of Public Administration includes in its Statute, approved by Royal Decree 464/2011, of April 1, the training of public employees.

evaluation and evaluations performed for the formulation and design of public policies (Varela, 2023).

For the first of them, the one related to training, there is the training that would be taught, in the Spanish case at the level of General Administration of the State by the INAP and the regulated training taught by university centers. As for the first one, it would be advisable and necessary to promote mixed evaluation and to train public employees of the body in charge of performing external PPE. In terms of training within university studies, it means training future professionals in a fairly extensive field of work and where each evaluation process involves a new, unique and particular exercise. The initial training in PPE is necessary to carry it out and this training requires diverse knowledge of subjects specific to the social sciences (research methodology, experimentation, statistics, etc.) (Picciotto, 2011). This article is framed in this context of the need for professionals who know how to perform PPE.

The institutionalization process of a discipline involves the transition from an informal practice to a more structured and formalized discipline (Harguindéguy and Echavarren, 2016; Barberá *et al.,* 2020). The professional consolidation of the discipline appears with the development of academic programs of higher education, by the existence of specialized publications and journals, by the existence of professional associations and a labor market for these professionals (Berndtson, 1991; Bustelo, 2006). The components of the evaluation process can be located at three levels: institutions, actors and ideas. At the institution level, it should be observed whether there are faculties, professional associations, specialized institutes and programs (Harguindéguy and Echavarren, 2016). In the case that concerns this paper, the institutionalization of the EPP could be observed at the level of faculties or centers of university education in the analysis of the degree subjects dedicated to the analysis and evaluation of public policies.[5] In other words, what space does public policy evaluation have in the university degree? This knowledge about the training received by higher education centers in the field of PPE has not been addressed by the scientific literature that has indeed provided more interest to the institutionalization process of public policy analy-

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5 Other topics (or indicators) that could be further studied are: (i) whether postgraduate courses specializing in public policy evaluation are offered; and (ii) whether training courses in public policy analysis and evaluation are available for staff in different public administrations. Information on the first section can be found in this text.

sis (Harguindéguy and Echavarren, 2016; Harguindéguy and Ruiloba, 2023), even leading some papers to ask about the content of the educational guides on public policies (Valmorisco and Vicente, 2023).

This article aims to fill this gap by analyzing the presence of training at university level in Public Policies in general and in Public Policy Evaluation in particular, from the curricula of the degrees in Social Sciences in the Spanish Public Universities, in order to prepare a diagnosis that can be applied at different times and periodically, to identify the level of adjustment between the academic training taught at the university and the demand for PPE professionals required in the socio-labor field. This work, therefore, focuses on the analysis of university training and the offer of evaluators specialized in different disciplines of social sciences.

To do this, this article is divided into the following sections. A first, following this introduction, it establishes the evolution of PPE teaching in the Spanish university context. The second part condenses the methodology designed to respond to the objective of this research that has been previously defined. The third part deals with the analysis of the presence and characterization of the subjects of analysis and evaluation of public policy in the Spanish public university context. After this, the text develops a proposal for conclusions on the discussion of the main findings and the need to establish a greater presence of training in public policy evaluation to respond to the demands of the professional-private market and in public administration.

The teaching of public policy evaluation in Spain

The studies on PPE are within the Area of knowledge of Political Science and Administration, which was constituted academically with the Law of University Reform.[6] This rule meant the creation of Knowledge Areas oriented to the constitution of university departments and their staff. This rule initiated a process of reform within the universities that would affect curricula (reform and creation) and the development of new universities in the hands of the Autonomous Communities. The first political scientists were graduates of the Complutense University of Madrid, with the only Faculty of Political

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6   Organic Law 11/1983, of August 25, on University Reform. Official State Gazette of 1 September 1983. The separation of Political Science from Political Law or Constitutional Law took place from its entry into force.

Science and Sociology. Subsequently, there was the proposal of the Autonomous University of Barcelona to create a second-cycle degree. After this, the degree was added at the National University of Distance Education and the Faculty of Political Science and Sociology at the University of Granada (Jerez and Luque, 2015). The Area of Political Science is established in Spain in accordance with the standards established by the international scientific community, excepting International Relations that are linked to International Law.[7]

Currently (academic year 2022-2023) the situation is presented in Table 1. There are six Departments of Political Science and Administration, without including as such the Department of Social Sciences of Universidad Carlos III de Madrid despite having a large number of political scientists to include, in its composition, the lines of Sociology and Economic History. Likewise, it shows the names of the 24 universities with an area of Political Science, which is normally included in a department with specialties on the field of Law. The formula usually takes the name of Public Law to a greater extent; also, Constitutional Law or in some cases, the department takes the names of the areas that compose it. It should be noted that, in very few cases, the area of Political Science is linked to Sociology.

Table 1

Political Science - Areas and Departments

No Area or Department Political Science Department	Area of Political Science	Department of Political Science
Cantabria	A Coruña	Autonomous Region of Madrid
Cordoba	Alcalá	Complutense of Madrid
Extremadura	Alicante	Grenada
Huelva	Almeria	Basque Country
Balearic Islands	Autonomous Community of Barcelona	Pompeu Fabra
Jaume I of Castellón	Barcelona	UNED
La Rioja	Burgos	

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7   It should be noted that the Department at the Autonomous University of Madrid takes the name of Political Science and International Relations. Teaching contents such as "Theory of International Relations" or "Formation of the International Society".

No Area or Department Political Science Department	Area of Political Science	Department of Political Science
Las Palmas de Gran Canaria	Cadiz	
Lion	Charles III of Madrid	
Lleida	Castilla La Mancha	
Oviedo	Girona	
Polytechnic of Cartagena	Jaén	
Polytechnic of Catalonia	La Laguna	
Polytechnic of Madrid	Malaga	
Polytechnic of Valencia	Miguel Hernández de Elche	
Seville	Murcia	
Valladolid	Pablo de Olavide	
	Public of Navarre	
	King Juan Carlos	
	Rovira i Virgili	
	Salamanca	
	Santiago de Compostela	
	Valencia	
	Vigo	
	Zaragoza	

The curricula that give shape to the studies of bachelor's in political science, and later the Degree with the implementation of the Higher Education Space involve defining the contents and organization of the studies of political scientists. Most of them respond to a combination of theoretical and instrumental subjects and more practical knowledge structured in core subjects, compulsory, optional and free configuration. Currently, the curriculum includes basic, compulsory, optional subjects (in which business practices are included or not) and the Final Degree Project.[8]

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8 The Bachelor's Degree in Political and Management Sciences is composed of 240 European Credit Transder System (ECTS). Each ECTS is equivalent to 10 face-to-face hours in the classroom at the university degree level. At the University of Granada are distributed in 60 ECTS of basic training,

The composition of studies in Political Science incorporates the study of political systems, comparative politics, political behavior, electoral processes, political parties, the European Union, the history of political ideas, political theory and knowledge that enhance the professional presence and the incorporation of political scientists, beyond the methods and techniques of social research, such as studies linked to public administration and the field of public policies, such as the analysis and evaluation of public policies.

At present, the evaluation is consubstantial to the analysis of public policies, as pointed out by Ruiz Martínez (2012), being intrinsic to the analysis of public policies and part of its doctrinal corpus. Much of the development of public policy studies came first with the development of studies at the Autonomous University of Barcelona (from 1986), at the National University of Distance Education (UNED) (from 1987), at the University of Granada (in 1988), the University of the Basque Country (1989), the University of Santiago de Compostela (1991), the Autonomous University of Madrid (1993) and the University of Barcelona (1994) (Jerez and Luque 2015, p.183; Harguindéguy Iloba 2023, p. 6). Secondly, the development is due to the implementation in 1999 of the Degree in "Management and Public Administration" and later of studies at the postgraduate level focused on public policies (see Harguindéguy and Ruiloba, 2023). Jerez and Luque (2015) say it has developed with a clear professional orientation since the 1990s.

Focusing on public policy (Gil, 2015), this may be partly due to the fact that, among the group of professors and university professors assigned to the area of Political Science and Administration between 1985 and 1992, there is only a monograph published on public policies in the 1980s out of a total of 95, seven in the 1990s out of almost a hundred, another seven in the first ten years of the millennium out of more than 80 published, and three out of 62, from 2010 until the publication of the text (Jerez, 2017). This points out that the field has not been very attractive to Spanish political scientists, unlike the theory or political process that gathers the greatest number of investigations. Table 2 shows the different universities offering undergraduate studies in Political Science and in Management and Public Administration.

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114 ECTS of compulsory subjects, 60 ECTS of electives, and the remaining 6 ECTS of the Final Degree Work. At the Autonomous University of Madrid the degree consists of 60 ECTS in basic training, 120 ECTS in compulsory training, 51 ECTS in electives and 9 in the Final Degree Work.

Table 2

University and university degree name

University	Degree in…
Alicante	Management and Public Administration
Almeria	Management and Public Administration
Autonomous Community of Barcelona	Political Science and Public Management
Autonomous Region of Madrid	Political Science and Public Administration
Barcelona	Management and Public Administration
Barcelona	Political and Administration Sciences
Burgos	Political Science and Public Management
Charles III of Madrid	Political Science
Complutense of Madrid	Political Science
Grenada	Political and Administration Sciences
Girona	Political and Administration Sciences
Jaén	Management and Public Administration
Malaga	Management and Public Administration
Murcia	Political Science, Government and Public Administration
Oviedo	Management and Public Administration
Salamanca	Political and Administration Sciences
Santiago de Compostela	Political Science and Administration
Vigo	Management and Public Management
Zaragoza	Management and Public Administration
Basque Country	Political Science and Public Management
Miguel Hernández de Elche	Political Science and Public Management
UNED	Political Science and Administration
Pablo de Olavide	Political and Administration Sciences
Polytechnic of Valencia	Management and Public Administration
Pompeu Fabra	Political and Administration Sciences
King Juan Carlos	Political Science and Public Management
Valencia	Political Science and Public Administration

Note. Double degrees or those degrees where the areas and departments of Political Science can have assigned teaching are not included.

At present, beyond the degree studies that include training in analysis and evaluation of public policies, there is another type of training: (i) at the postgraduate level, in master's degree (official) or master's degree of its own, and (ii) at the doctoral level. In this case in Political Science, Public Policy or Public Management.[9] Although, as will be seen in this work, there is also training in Public Policy in other university degrees (for example, in Criminology, Sociology and Social Work). In the area of training in PPE at the postgraduate level, two university degrees stand out: the Master in Evaluation of Programs and Public Policies, led by Professor María Bustelo at the Complutense University of Madrid, and the Master in Evaluation of Public Policies at the University of Seville led by José Luis Osuna.

The implementation of the European Higher Education Area (Bologna Process) imposed a paradigm shift in the way of understanding the teaching-learning process. The university focused its practice on the development of skills that allow its graduates to enter society or the labor market. The process involves identifying the professional competencies established according to the curriculum in basic, general, specific and transversal and materialize in a series of learning outcomes.

We assume that there is an adjustment between the training received by university students and the professional occupation of the graduate in the development of public policy analysis and evaluations. Hence, we understand that there is a correspondence between the different competencies established for the subjects of analysis and evaluation of public policies in the curriculum of Political Science and Administration (and its derivatives as Management and Public Administration) and the competency demand of the profession.

The training of professionals, both in initial stages at the degree level and through continuous training, presents as one of the strategies with the greatest impact in the face of the new challenges that arise. On the one hand, as indicated in the first paragraphs of this work, to give legitimacy to the democratic system and, on the other hand, public higher education must be able to respond to social challenges with specialized graduates and trained in activities oriented to labor insertion with high levels of employability.

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9   The work of Harguindéguy and Ruibola (2023, p. 8) quantifies the presence of 26 master's degrees (six in Political Science, 12 in Public Policy and eight in Public Management) and 12 official doctoral programs.

Materials and method

To give a coherent and structured response to the purpose of this research, which aims to establish a map of undergraduate education in PPE, the following fieldwork was carried out. First, the group of Spanish universities that offer studies in Law and Political Science was identified, corresponding to a total of 66 according to the information provided by the Spanish Association of Political Science and Administration (AECPA). Secondly, two criteria were established to be considered as units of analysis: (i) the character of a public university, and (ii) that provides training at the university degree level. The selection does not include private universities (for example, the Loyola Andalusia University or the Pontifical University of Comillas, among others) nor those that only operate in postgraduate or continuing training (for example, the International University of Andalusia or the Menéndez Pelayo International University). The application of these two criteria left us the figure of 48 universities that constitute as our units of analysis.

From the list of selected universities, a database was designed with information related to university degrees where the subject of Public Policy Evaluation is taught after the review of the curriculum of the degrees in Social, Economic and Legal Sciences in those 48 universities. In relation to the degrees in Social, Economic and Legal Sciences, it should be noted that the curricula of the degrees in Political Science, Public Management, Sociology, Economics, International Relations, Criminology, Business Administration, and Law were reviewed. Information was collected on the university degree, the department responsible for teaching, the subject (number of credits, course, semester, and character of the subject: basic training, mandatory, optional, business practices and the final degree work). This review of the different curricula was carried out between February and April 2023 on the curricula in force in the 2022-2023 academic year. This means that curricula that are in the process of extinction are not taken into account.

It should be noted that, although this work was started with the idea of detecting only the subjects of Public Policy Evaluation *per se*, due to its low frequency, it was opted to introduce also any subject that had a content in evaluation. The database contains information on the subjects of: Public Policy, Public Policy Analysis, Public Policy Analysis and Evaluation, and Public Policy Evaluation. Another category was collected under "another denomination" for those subjects that had another denomination and that correspond to

contents of Public Policies, such as "Government and Public Policies" taught at the Pompeu Fabra University (UPF) of Barcelona.

It is necessary to indicate that the subjects of public policy have not been considered as observation units. Subjects such as, for example, "Public Policies in Spain" taught at the Rey Juan Carlos University or "Public Administrative Policies" of the University of Castilla la Mancha, although it seems that they would adapt to the previous category of "Public Policies" respond to a sectoral vision and were not included. Many of these public policies have been developed within the framework of the Welfare State, focusing on the provision of social policies either labor, social, socio-criminal, or have a profile of International Relations, such as the subject of "Foreign Policy of Spain", or arise within the framework of the European Union (as would be the case of "Policies of the European Union") focused on the structure or process rather than on the result in terms of public policies (Vallès and Martí, 2005).

These contents have been developed by the specialization of some of the members of that Department or University Area, or by the inclusion of these contents in some university degree of Social Sciences such as, for example, "Socio-labor Policies" in the Degree in Labor Relations and Human Resources (University of Granada), or "Social Policy" in the Degree in Social Work (University of Jaén), "European Public Policy" (University of Alcalá). During the research, also, more specific subjects of evaluation of regional policies, labor, socio-criminal, etc. were found, which were not included since it was estimated that they were not relevant for this work due to their object, which is the evaluation of public policies in their holistic view.

Therefore, four categories of inclusion of the subjects have been established: "Public Policies", "Analysis of Public Policies", "Analysis and Evaluation of Public Policies", and "Evaluation of Public Policies". In most cases the name of the subject corresponds to one of the first four denominations. In some university degrees, several subjects have been found with content of Public Policy or PPE with different denominations that are not covered by the rest of the variables chosen for the subjects. In these situations where an alternative degree is presented, the teacher's guide for each was reviewed to see if it adapts or closely resembles one of the four main coding categories.

Likewise, for its codification and for a better representation of the data, the university degrees have been grouped as follows: for the degrees in Political Science, those whose denomination was "Political and Administration Sciences", "Political Sciences", "Political Sciences and Public Administra-

tion", etc., have been grouped all under the denomination of "Political Sciences"; for Criminology, both "Criminology" and "Criminology and Security", have been grouped under "Criminology"; for International Relations, both "International Relations" and "International Studies" have been grouped under "International Relations" and the same has been done for the double degrees.

Once the database is completed based on a detailed review of the websites of the 48 public universities, the next step would be their processing by the statistical software "SPSS". The analysis is presented in two stages. First, a univariate analysis of descriptive character has been carried out mainly with the objective of seeing the distribution of the contents of Public Policies in general and of Public Policy Evaluation in particular. Secondly, a multivariate analysis is carried out in search of more explanation of the collected data.

The main limitation of this work and the perspective adopted lies in the fact that the analysis presented does not fall within the evaluation approach adopted by the Area or Department in the formulation of the teaching guide and the teacher's margin in the teaching of the subject derived from the autonomy of teaching (Harguindéguy and Ruiloba, 2023). As Meller and Stockmann (2013) claim, there are as many approaches as there are evaluators. Despite this, the programs of the subjects refer to the main manuals on public policy evaluation published in Spanish (Briones, 1991; Ballart, 1992; Vedung, 1997; Osuna and Márquez, 2000; Alvira, 2002; Bañon, 2003; Pérez, 2005; Morra and Rist, 2009; García Pérez, 2014; Stufflebeam and Shinkfield, 1987, 2007) and in English (Weiss, 1972; Fisher 1995) as well as the various methodological guides published by the main centers dedicated to the evaluation of public policies in Spain (AEVAL, IVÀLUA, etc.) or by international organizations such as the European Union, the World Bank, the United Nations or the Organization for Economic Co-operation and Development.

Results

A total of 100 university degrees have been identified, which include subjects of analysis and evaluation of public policies according to the criteria established in the methodology section. Within the universities studied, there are some where no subjects have been found, which are listed below: Alcalá, Cantabria, Córdoba, Extremadura, Huelva, Jaume I de Castellón, La Laguna, La Rioja, Las Palmas de Gran Canaria, León, Lleida, Polytechnic of Catalonia, Polytechnic of Madrid, and Seville.

Table 3 indicates whether the subjects (Public Policy, Public Policy Analysis, Public Policy Analysis and Evaluation, and Public Policy Evaluation) are in the curriculum of a degree in Political Science—or not. Of the total of 100 degrees, 57 belong to Political Science (either as a single degree or in a double degree, including the degree of Management and Public Administration since it has been considered in many cases as a diploma of the disappeared Bachelor in Politics and Sociology —specialty Politics— or the Bachelor in Political and Administration Sciences), and 43 to other disciplines of the Social Sciences, such as Criminology, International Relations, Social Work or Sociology.

Table 3

Universities and undergraduate degrees

	Bachelor's Degrees in Other Social Sciences	Bachelor's Degree in Political Science	Total Degrees
Autonomous Community of Barcelona	5	3	8
Autonomous Region of Madrid	1	2	3
Charles III of Madrid	7	4	11
Complutense of Madrid	2	2	4
A Coruña	2	0	2
Alicante	1	1	2
Almeria	0	2	2
Barcelona	4	4	8
Burgos	0	2	2
Cadiz	1	0	1
Castilla La Mancha	2	0	2
Grenada	1	4	5
Girona	3	2	5
Jaén	1	1	2

	Bachelor's Degrees in Other Social Sciences	Bachelor's Degree in Political Science	Total Degrees
Malaga	1	1	2
Murcia	1	1	2
Oviedo	1	1	2
Salamanca	1	3	4
Santiago de Compostela	0	1	1
Valladolid	1	0	1
Vigo	2	1	3
Zaragoza	0	1	1
Basque Country	0	2	2
Miguel Hernández de Elche	0	1	1
UNED	1	2	3
Pablo de Olavide	0	4	4
Polytechnic of Cartagena	1	0	1
Polytechnic of Valencia	0	1	1
Pompeu Fabra	1	2	3
Public of Navarre	1	0	1
King Juan Carlos	0	6	6
Rovira i Virgili	1	0	1
Balearic Islands	1	0	1
Valencia	0	3	3
Total	43	57	100

If we focus on universities, there is a higher proportion of degrees with Public Policy content in the following universities, from highest to lowest: Carlos III of Madrid (11 degrees), Autonomous University of Barcelona

and University of Barcelona (eight degrees) and King Juan Carlos (six degrees). It is noted that while there are several universities with significant representation, most of them usually have one or two degrees. Among the universities with the highest proportion, there is a high number of degrees not belonging to the field of Political Science, such as Carlos III University of Madrid, which out of the 11 degrees, seven are from other disciplines and only four from Political Science. The seven degrees in other disciplines are: in International Studies (single and double degrees, in a total of four), and the degrees in Sociology, Economics and the joint degree in Philosophy, Politics and Economics. This situation contrasts with the case of the King Juan Carlos University, which out of the six degrees analyzed, all are of Political Science.

Generally, the trend seems to indicate a greater presence in degrees of Political Science, although there is also a close number of disciplines in the field of Social Sciences (43 versus 57) that also offer subjects with the aforementioned content. Within the degrees of Political Science, about 31.6% of the 57 found correspond to the degree of Political Science, which rises to 48.5% if we include the degrees of Management and Public Administration; the rest would belong to the numerous double degrees that are articulated with that of Political Science, being in this case the most common double degree in Political Science and Law, which equates to 24.7% of the total. Therefore, it seems that the composition of the 57 degrees of Political Science is represented mostly in the simple degrees of Political Science and Public Management and the double degree of Political Science and Law, both reaching 73.2%, the rest being other double degrees of Political Science with Economy, Sociology, Journalism or International Relations.

At this point, it should be noted as Miller and Rodríguez (2023, p. 58) that the training in PPE differs in what is understood and what is taught if it is carried out from the area of Political Science and Administration or from an area of Economics. From Political Science, the analysis and evaluation of public policies adopts a comprehensive perspective with a broader vision focusing on the stages, and everything related to public policy. The analysis of the different stages (diagnosis, formulation, implementation and evaluation) seeks to clarify the dynamics and processes under the use of qualitative and quantitative research techniques. In contrast, the study of PPE from the Economics perspective focuses on experimentation to determine the effectiveness of the theory of change under a causal approach (Abadie and Cattaneo,

2018) and/or learning different methods to carry out economic evaluations (Durrance, 2020). The main methods are cost-effectiveness analysis, cost-consequences analysis, cost-minimization analysis, cost-utility analysis and cost-benefit analysis (Parera, 2009; De La Fuente *et al*., 2021). All of them seek to identify, measure and compare results and costs of different policies. The difference between them is established in the way of measuring the results and, therefore, also in the type of evaluation question they can answer. The presence of various types of assessment was already accepted in the first PPE guidelines (Newman *et al.,* 1995).

As for the nature of the degrees analyzed, in table 4, out of the total of 100 analyzed, it is observed that 63 of them are simple degrees, and 37 are configured as double degrees. If we delve this time into the 43 degrees that are not of Political Science, only 36 are simple and seven are double; this supposes that the studied subjects are not so present in the double degrees, optimizing in this case the teaching of other subjects (of basic training and mandatory) in detriment of other knowledge as the analysis and the evaluation of public policies.

Table 4
Degree in Political Science and Grade Structure

Political Science	Simple Grade	Double Grade	Total
No	36	7	43
Yes	27	30	57
Total	63	37	100

As seen in table 4, the opposite occurs in the case of degrees in Political Science: the presence of the subjects is very similar in both single (27) and double (30) degrees. In this case, the competences acquired during the learning process of the double degrees are part of the training curriculum and do not overlap with other similar subjects that may include the other disciplines that make up the double degree. This implies originality and a certain exclusivity.

Table 5

Discipline Added to Political Science in Double Degrees

Degrees	Frequency	%
Right	14	37.8
International Relations	3	8.1
Sociology	8	21.6
Philosophy	2	5.4
Journalism	2	5.4
Economics	1	2.7
Double degrees apart from Political Science	7	18.9
Total	37	100

Among the disciplines added to Political Science in the double degrees, the most common is Law (with 14%), followed by Sociology (8%). The seven double degrees in which public subjects appear are in the double degrees in Law and International Relations, Business Administration and International Relations, and Law and Criminology.

The number of subjects taught varies between schools; in most cases there is only one subject, 72%. At the opposite extreme, there is the degree in Political and Administration Sciences of the Pompeu Fabra University (Barcelona), which has five subjects: two compulsory of six ECTS each, and three optional of four ECTS (12 compulsory credits and 12 optional credits respectively). In addition, the analysis indicates that it is more common to find the subjects in those degrees in universities that have a department of Political Science and Administration. The average in this case is 1.5 subjects (standard deviation of 0.723), compared to 1.35 subjects on average (standard deviation of 0.644), in the areas of Political Science and Administration.

Table 6

Denomination of the subjects of the degree

Subjects	Frequency	%
Public Policy	19	19
Public Policy Analysis	29	29
Analysis and Evaluation of Public Policies	30	30
Evaluation of Public Policies	22	22
Total	100	100

As for the incorporation of the subjects studied into the curriculum, in Table 6 it can be observed PPE subjects belong to at least one quarter (22%) of the total, while 30% combine analysis and evaluation subjects. The remaining half of the universities bet on the Analysis of Public Policies, which usually have a small section dedicated to the EPP within it (usually a topic, which is usually the last one within the teaching guide), while others bet on a general subject of Public Policies that encompasses both disciplines where they are taught more generally. The data show that, if considering the results in APPE and EPP, 52% of the degrees have training in Public Policy Evaluation.

In order to know the relevance given to the subjects, we observe the load of credits in the degrees in which they are. Considering that an ECTS credit equals 25 hours of work (ten in the classroom and 15 at home), if the load is greater, the student will have more hours of work and the subject can be taught more deeply.

Table 7

Total ECTS in grades

ECTS	Frequency	%
3	3	3
4	3	3
4.5	5	5
6	61	61
9	3	3

ECTS	Frequency	%
12	16	16
13.5	1	1
15	2	2
16	1	1
18	4	4
24	1	1
Total	100	100

The results of table 7 seem to indicate that 61% of the degrees found only offer six ECTS of training in Public Policy, Analysis of Public Policies, Analysis and Evaluation of Public Policies and/or Evaluation of Public Policies, being the load of credits of 12 ECTS the second most frequent with 16%; in some cases there is an overrepresentation, as is once again the aforementioned case of the degree in Political Sciences and Administration of the UPF, with 24 credits. Out of the total ECTS taught, 554.5 would be mandatory and 229.5 optional. There is a higher average with respect to the mandatory ones than the optional ones, being the average of the first 5.54 credits (standard deviation 3.591) and that of the second 2.29 (standard deviation 3.883).

Since the aim of this paper is to analyze the presence of PPE in university degrees, as for the 52 degrees of the set of 100 hat offer training in APPE and in PPE, 200 compulsory credits are taught in total and 157.5 optional credits. The number of compulsory and optional ECTS taught in these grades is much more equal than those seen from the common total. However, it should be noted that most of the optional ECTS of the general sum (229.5) would belong to subjects of APPE and EPP (157.5), so it seems that subjects of PP and APP usually have greater exposure to students as compulsory subjects or basic training, while subjects of APPE and EPP are seen more optionally, although they continue to have a remarkable presence among the mandatory.

Regarding the course in which the subjects are taught, most of these concentrate in the 3rd and 4th years of the university curriculum. From here, it can be assumed that the subjects analyzed are usually taught at a time when students have reached a certain maturity with respect to their training, being 3rd and 4th the last years of a common university degree, and the twilight of a double degree. In the case of double degrees, these subjects can be studied

in 5th grade, the last year of career, this being one of the last subjects students would be taught before graduating. The cases found in which the subjects are placed in the "1st semester" only amount to 5%. This means that the subjects analyzed are not usually considered for teaching in the first year of the degree, so there is a general tendency to offer this type of training to students more advanced in the degree, facilitating its acquisition to be applied in the labor market. In addition, as indicated above, the practice of PPE requires knowledge of research methodology, statistics or econometrics, sociology, etc., making its inclusion in the first years of university training unfeasible.

As observed, the training in analysis and evaluation of public policies is mostly linked to the training in Political Science being part of the curricular training of students. Despite this predominance, the presence of analysis and public policy content in other studies is observed, pointing to the confluence of different knowledge around the same problem. Ther are 43 degrees of related areas of knowledge that include knowledge in public policy analysis and evaluation. Specifically, following the proposed categorization, there are 11 degrees with training in Public Policies, ten in Public Policy Analysis, one in Analysis and Evaluation of Public Policies and a total of 21 in Evaluation of Public Policies. The latter linked to academic degrees in Criminology, Economics and Social Work. It is important to note that the presence in these degrees is unsignificant in the general computation since there are only PPE subjects in four degrees in Social Work, while the degree is offered in a total of 37 public universities. The same goes for the degree in Economics, which is taught at most public universities.

Conclusions and discussion

As a result of this study, it can be determined that within the universities that offer subjects with content of Public Policy Evaluation, these are given a diverse and unequal relevance. The credit load that universities invest in different curricula ranges from the slightest to an extraordinary emphasis on evaluation training, so it would be no surprising that some universities end up producing more evaluators than others. However, by virtue of the data analyzed it can be determined that the demand for the evaluation causes it to be studied in one way or another, either as a mandatory subject or as an optional subject. Universities end up having different strategies, those that in-

vest more in evaluation do this, for example, a mandatory general subject of Public Policies with some subject of evaluation, followed by another optional subject within the same program of studies that focuses more on the Evaluation of Public Policies as such. Others opt for two compulsory subjects, or a wide repertoire, while most offer a single subject, giving it less importance.

The study of the EPP would then be in a diffuse situation, giving itself either as a central subject with respect to the others or as an academic niche that could interest some students who want to pursue it and perhaps train more deeply in it in a *postgraduate course, instead of dedicating a deeper subject to their curriculum.* One of the possible reasons for the diversity of the EPP study may be the late use of evaluation as an academic practice in Spain, this being initially implemented in the 1990s (Viñas, 2009; Arriazu, 2015), four years after the integration of Spain into the European Union, which determines evaluation as a mandatory practice. As pointed out by Jacob *et al.* (2015) who indicate that Spain is one of the countries, with Finland and Japan, where the culture of evaluation has improved the most in the first decade of the millennium.

It also emphasizes that the subjects have been integrated into both the simple degree of Political Science and its double degrees, appearing especially on several occasions the double degree in Political Science and Law. While perhaps this may be due to the historical relationship between both disciplines, having traditionally taken the study of Political Science in the field of Political Law before its eventual separation relatively recently, in 1984, with the Law of University Reform (Jerez and Luque, 2016); the greater presence of the double degree in Political Science and Law would be, then, a glimpse of the apparent relationship of the Evaluation expansion of Public Policies with the very institutionalization of the degree in Political Science.

With the recent Law 27/2022 and the Covid-19 crisis that seems to have stoked the demand for evaluation and despite the adjustment made with the Bologna process in the current context, the university training environment and the work environment walk at different speeds. The introduction of possible changes to the curricula requires a lengthy process. The lengthy steps that can be taken over time can lead to a gap between the supply and demand of professionals in the evaluation of public programs and policies. It should be borne in mind that evaluation techniques conform to the advances and methodological developments of the social sciences (Miller and Rodríguez, 2023) that go at a higher speed than that which reviews, redesigns and executes curricula.

In line with the objective of our research, regarding the presence of training in analysis and evaluation of public policies, we have limited the different university degrees of public universities in Spain. In this sense, the research has led us to discover that only 48 public universities in Spain consist of subjects of Public Policy, Analysis of Public Policies, Analysis and Evaluation of Public Policies and Evaluation of Public Policies. Hence, it can be concluded that although the Public Policy Evaluation is integrated and enjoys its instruction in several public universities in the country, its institutionalization is not fully seen and its delivery is usually given inconsistently and with an uneven emphasis on some aspects, such as the evaluation criteria. The aim of the new law is to create a common integration framework to boost public evaluation policy, the disparity in education could hinder the future integration into the labor market of these new assessment professionals who will eventually have to use the same basic tools.

Referring to Law 27/2022, of December 20, on the institutionalization of the evaluation of public policies in the General Administration of the State, in its preamble, it is argued as one of the motivators of its elaboration: the lack of uniformity of the practice of evaluation, with more than a hundred units with evaluative competence that present differences of criteria when defining the evaluation of public policies. This need for uniformity is understood as an increase in the demand for technicians from a Political Science training who specialize in evaluation. With the elaboration of the aforementioned law and with the awareness generated by the coronavirus crisis, it seems that the evaluation is beginning to take a different approach with the objective of achieving greater effectiveness in public policies, determining a more efficient contribution of public resources, and the learning and feedback of public bodies, although, as mentioned above, it seems that the academic field has not yet reached the point necessary to reach the world of work and its demands with respect to evaluation.

Finally, and as indicated in the methodology section, the main limitation of this research is not to focus on the approach adopted by the teacher in the teaching-learning process. This limitation can be considered a future line of work that addresses from the review of the program contents of the subjects of analysis and evaluation of public policies, different issues that concern the training of professionals. First, the PPE approach(s) envisaged. Secondly, the content itself, i.e., whether the subject is based on knowledge of a theoretical and/or practical nature (whether the subjects have theoretical

and/or the empirical component). Thirdly, the weights assigned to the different components (theory, practices, exams, etc.) necessary to pass the subject. Furthermore, such research should also consider issues related to how they are articulated: (i) the content of instruments and techniques (quantitative versus qualitative), (ii) the different training materials, whether they focus on national cases or consider foreign cases, (iii) the origin of bibliographic references, whether they focus on a "national" view or develop local or contextual approaches in PPE.

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Assessment of sexual satisfaction in the LGBTIQ population of Ecuador

Evaluación de la satisfacción sexual en la población LGBTIQ Ecuador

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Abstract

Sexual satisfaction is expressed as an evaluation to gauge the level of enjoyment in one's sexual life. Studies of the sexuality of the LGBTIQ population have been limited, as this group grapples with taboos, repression, and social stigma, which impact various aspects of their lives, including health and sexual satisfaction. This study investigates the unidimensional scale of sexual satisfaction in the LGBTIQ population in Ecuador. We analyze how this scale is affected when compared to different sociodemographic variables. We used a quantitative, descriptive, correlational, and prospective methodology, applying a questionnaire to 625 residents of Ecuador to gather sociodemographic data and the Sexual Satisfaction Index (SSI). The results on the unidimensional scale of sexual satisfaction are: 33% of respondents report sexual satisfaction, while 60.5% experience sexual dissatisfaction, and 6.6% undergo a severe stress experience. There is less sexual dissatisfaction among individuals living in Quito, males, homosexuals, those with a higher level of education, and Afro-Americans, with a P value < 0,005 that is statistically significant. A negative value of sexual satisfaction is observed in the studied population, emphasizing the need for further investigation into the causes and factors influencing sexual dissatisfaction. This will help us understand their needs and provide support in a safe and respectful environment due to ongoing discrimination.

Keywords

Gay, lesbian, bisexual, transsexual, intersex, sexual satisfaction

Resumen

La satisfacción sexual se expresa como una evaluación, para manifestar el nivel de agrado a la vida sexual. Los estudios en la sexualidad de la población LGBTIQ han sido poco profundizados, grupos rodeados de tabúes, víctimas de una represión y condenas sociales; afectando las diferentes dimensiones de la salud, como la satisfacción sexual. Este trabajo investiga la escala unidimensional de la satisfacción sexual en la población LGBTIQ Ecuador. Se analiza cómo esta escala es afectada al correlacionarse con las diferentes variables sociodemográficas. Se utiliza una metodología cuantitativa, correlacional descriptiva y prospectiva. Se aplica: cuestionario a 625 personas residentes en Ecuador con recogida de datos sociodemográficos, Índice de Satisfacción Sexual (ISS).

Los resultados de la escala unidimensional de satisfacción sexual muestran que el 33 % de la población tiene satisfacción sexual, el 60,5 % experimenta insatisfacción sexual y un 6,6 % reporta una experiencia severa de estrés en esta área. Se observa una menor insatisfacción sexual en los residentes de la ciudad de Quito, en hombres, en personas homosexuales, en aquellos con un nivel educativo más alto y en individuos afrodescendientes, con un valor de p < 0,005, lo que indica una significancia estadística.

Estos resultados reflejan un nivel negativo de satisfacción sexual en la población estudiada. Por lo tanto, se hace necesario continuar investigando la satisfacción sexual para comprender las causas y los factores que inciden en la insatisfacción sexual. Es crucial visibilizar las necesidades y los apoyos que requiere esta comunidad en un entorno seguro y respetuoso, especialmente considerando los constantes actos de discriminación que enfrentan.

Palabras clave

Gay, lesbiana, bisexual, transexual, intersex, satisfacción sexual.

Introduction

The World Health Organization (WHO, 2018) defines sexual health as: "A state of physical, mental and social well-being in relation to sexuality, and not just the absence of disease, dysfunction or discomfort." Sexual health requires a positive and respectful approach to sexuality and sexual relations, as well as the possibility of enjoyable and safe sexual experiences, free from all discrimination and violence. For all people to achieve and maintain good sexual health, sexual rights must be respected, protected and fulfilled for all people (Soria, 2013).

According to Aguilar (2020), sexual satisfaction refers to "the ability of people to provide and receive sexual pleasure, which involves experiencing and evaluating feelings, emotions, as well as physiological and psychological reactions during sexual behavior" (p. 12), harmonizing the bio-psycho-socio-cultural and ideological dimensions with a focus on pleasure and satisfaction.

In this regard, the declaration and technical document on Sexual Health for the Millennium (PAHO, 2009), and the World Health Organization (2018) affirm: "Pleasure is not only a yearning but is perhaps the most powerful motivating factor of sexual behavior. To overlook the role of sexual pleasure in the fulfillment and happiness of the human being would be a mistake." In short, sexual pleasure helps to build the structure of kinship in the relationship, it contributes to overall happiness in the life of both men and women (united or not in a relationship) and is associated with various aspects of good health. Hence, sexual pleasure is not frivolous or unnecessary but it is essential (Fernández, 2004).

Likewise, sexual satisfaction is an essential component in the different sexual practices and demonstrations of tenderness, both at the time of sexual intercourse and in the varied manifestations of affection that each couple lives in a natural, different and unrepeatable way and that are quality elements in sexual satisfaction (Mora, 2023).

According to Vega Martel (2020), a person's level of sexual satisfaction is influenced by a variety of factors, which include more richness in sexual practices, socio-emotional aspects in the relationship of couple, knowledge, attitudes and values towards sexuality, physical health and vitality, adequacy of environmental spaces, as well as the development of imagination.

These conceptualizations are also valid for the LGBTIQ population that make up the sexual minorities that experience an integral well-being that

affects their sexual satisfaction, seeking pleasure, respect, security in the practice of their sexual rights, as stated by the WHO (2018): "all people have the right to exercise control over their sexuality and their sexual and reproductive health and to decide freely and responsibly about them, without coercion, discrimination or violence" (p. 3).

It is necessary to keep in mind that sexuality is no longer just a problem of the intimacy of two, it is an inherent part of the integral health of human beings who live and work in a world of interrelationships as stated by the WHO (2018): "Sexuality is a central aspect of the human being that is present throughout his/her life. It covers sex, gender identities and roles, sexual orientation, eroticism, pleasure, intimacy and reproduction" (p. 3). It is felt and expressed through thoughts, fantasies, desires, beliefs, attitudes, values, behaviors, practices, roles and relationships (Moya, 2017). While sexuality may include all of these dimensions, not all of them are always experienced or expressed (Gruskin, 2019). Sexual satisfaction is influenced by the interaction of biological, psychological, social, economic, political, cultural, ethical, legal, historical, religious and spiritual factors. As stated by WAS (2018), in its declaration and technical document on Sexual Health for the Millennium "Sexual rights are an integral component of basic human rights and are therefore inalienable and universal" (p. 3). Sexual health is an integral component of the right to the enjoyment of the highest attainable standard of health. Sexual health cannot be achieved or maintained without sexual rights for all.

At the national level, although there is legal support for members of the LGBTIQ group to express their sexual orientation without any fear, in practice there are problems related to their emotional health (Albarracín and Rincón, 2013).

In Ecuador, homosexuality was considered a crime under the regulations, but in 1997 it was decriminalized, eliminating it from the classification of crimes in the Ecuadorian criminal code. Subsequently, the 2008 Constitution of the Republic of Ecuador sought to stop discrimination against these groups, incorporating specific provisions within its normative body: art. 11, paragraph 2: "No one may be discriminated against on the basis of ethnicity, place of birth, sex, gender identity…", this was the result of several years of struggle of the LGBTI population (Martínez, 2022). However, several statistical data indicate that discrimination against this diverse group remains prevalent. Therefore, it is crucial to maintain and strengthen existing natio-

nal education policies, which function as a protective factor for the LGBTIQ population, as mentioned by Loverno (2023).

Hence the importance of this research, which focuses on analyzing and studying sexual satisfaction and other factors in the LGBTIQ population living in Ecuador (INEC, 2013). As for the LGBTIQ population, "There are few interested investigations that examine, from a biopsychosociocultural perspective, sexual satisfaction in same-sex couples" (Calvillo *et al.,* 2018; Betancourt Torres *et al.,* 2017). Similarly, there are several films that have been focused on heterosexual population in large theaters as seen in Paz (2015).

In other cultures, the diverse population is more accepted, where they have more resources and support, which can have a positive impact on sexual satisfaction (Mayesa, 2022). In addition, personal factors, such as past experiences, individual coping mechanisms, can also play a basic role in the LGBTIQ population, as stated by Jiménez *et al.* (2011), a reality that is also observed in the population under investigation.

According to Calvillo *et al.* (2020), sexual satisfaction would also be influenced by a homophobia of the homosexual group. As Holland (2021) expresses, sexual satisfaction would be positively related to good communication and negatively to homophobia, however, they would be factors to be studied in the Ecuadorian population (Carrasco, 2019; Fuertes, 2000).

In short, despite the legal recognition that the right to sexual identity is fundamental to personal well-being, the LGBTIQ population in Ecuador continues to face discrimination and rejection in different areas in relation to their sexuality. This research could be relevant due to the scarcity of existing literature on sexuality in the LGBTIQ population. In addition, as Botello and Guerrero (2018) point out, there is a lack of studies on sexual satisfaction specifically in the LGBTIQ population in Ecuador, with more studies in the heterosexual population as mentioned by Aestesis (2020).

Materials and method

A quantitative methodology was applied in this research, with the aim of analyzing the problem by interpreting the one-dimensional scale results of sexual satisfaction. A descriptive, prospective study is applied, with a transversal, correlational, analytical, and observational design, with non-probabilistic incidental sampling. This sample is called a snowball because each subject

studied proposes to others, i.e., some individuals are selected and these lead to others, and these in turn to others until obtaining a sufficient sample. This technique corresponds to a non-probabilistic sampling and is carried out in populations in which individuals are not known or cannot be accessed, as is the case of the LGBTIQ population.

The data obtained in this study were analyzed using the IBM SPSS Statistics v. 25 program. It started with the creation of the database, the correction of the questionnaires and finally, the statistical analyses. The reliability levels (Cronbach's alpha) of the instrument used, Index of Sexual Satisfaction (Santos-Iglesias *et al.*, 2009), were then evaluated. Exploratory factor analyses of the instrument were performed. The results showed that the dimensions found correspond to the original tests of Kolmogorov-Smirnof normal contrast analysis. Kruskal-Wallis test of independent samples was determined (Flores, 2021; Pedrosa *et al.,* 2015).

In the first instance, the univariate descriptive statistic was used to know the sociodemographic characteristics of the population and sample studied, estimating frequencies, percentages, categorical variables, mean, fashion, median and standard deviation with their statistical significance. The correlational bivariate analysis was performed with Spearman's Rho coefficient to determine the existence of a relationship between the study variables, corresponding to the main objective of this research. Likewise, this procedure was applied for associating the study variables and the sociodemographic variables of the participants, deepening on the result with the Kruskal-Wallis application of independent samples and the Mann-Whitney U test for two independent samples.

An acceptable correlation was considered to infer an important association between significance values > 0.20 and $p < 0.05$ and < 0.001.

Before the final application, a pilot study was conducted with 20 participants to review the understanding of the instruments. The order and meaning of the statements proposed by Rosenberg and Hudson in the two instruments (Moral-de la Rubia, 2018) was maintained.

The questionnaires applied were:

- Questionnaire with socio-demographic data.
- Informed consent.
- Sexual Satisfaction Index (SSI).

In any case, the participants signed a consent that included their free and voluntary participation, in addition to their contribution to the construction of new analyses and studies in the LGBTIQ population.

The questionnaires are administered in person and online by 625 LGB-TIQ people living in Ecuador who participated voluntarily. Sociodemographic data are collected: age, sex, gender, sexual orientation, education level, marital status, partners and sex life, and the Sexual Satisfaction Index.

The Sexual Satisfaction Index (SSI) was developed by Hudson *et al.* (1981) and validated again by Santos-Iglesias *et al.* (2009) (Sierra J., 2014) which consists of a questionnaire that presents a 0.90 Cronbach Alpha and a discriminant validity < 0.05, which was used as a tool to evaluate sexual dissatisfaction with the partner. Its initial objective was to develop a useful instrument in clinical and research because of its brevity of application and its ease of scoring. In this way they selected a set of items that reflected sexual behaviors applicable to heterogeneous groups of people regardless of ideology, moral criteria, sexual experiences or attitudes. It is a short scale proposed to be used in the clinical field (Sánchez, 2015).

The SSI is composed of 25 items grouped on a one-dimensional scale that reflect the overall aspects of quality of sexual partner life. All items respond to a Likert scale ranging from 1 (never) to 5 (always).

A single score on sexual dissatisfaction is obtained which is the result of adding the item scores after inverting the item scores 1,2,3,9,10,12,16,17,21,22 and 23, and subtracting 25 from this result. In this way, a score between 0 and 100 is obtained where the higher the score, the higher the sexual dissatisfaction, determining a score greater than 30 that suggests sexual dissatisfaction, a score greater than 70 reflects a severe experience of stress, with the possibility of sexual coercion (Moral-de la Rubia, 2018)

Internal consistency reliability indices (Cronbach's alpha) show values ranging from 0.86 to 0.95, while data on their test-retest reliability demonstrate the temporal stability of the scale scores, finding test-retest reliability values equal to 0.9 (Hudson *et al.*, 2014).

Results

Table 1
Sociodemographic characteristics

Variable	Final value	Frequency	Percentage
Age	25	303	48.5
	26–35	196	31.4
	36–46	90	14.4
	47–56	27	4.3
	57+	9	1.4
Place of birth	Sierra	451	72.2
	Coast	80	12.8
	Amazon	4	0.6
	Foreign	90	14.4
Place of residence	Quito	394	63
	Cuenca	40	6.4
	Latacunga	12	1.9
	Guayaquil	26	4.2
	Ibarra	17	2.7
	Foreign	128	20.5
	Amazon	4	0.6
	Galapagos Islands	1	0.2
	Esmeraldas	3	0.5
Sex	Female	168	26.9
	Male	426	68.2
	I'd rather not say	31	5
What is your sexual orientation?	Homosexual	327	52.3
	Bisexual	106	17
	Lesbian	136	21.8
	Trans	47	7.5
	Intersex	3	0.5
	Other	6	1

Variable	Final value	Frequency	Percentage
What is your marital status?	Single	519	83
	Married	10	1.6
	Free Union	68	10.9
	Divorced	28	4.5
Level of studies	None	22	3.5
	Basic Education	28	4.5
	High school	164	26.2
	Superior	411	65.8
How do you self-identify?	Mestizo	531	85
	Indigenous	17	2.7
	Afro-descendant	19	3
	White	41	6.6
	Montubio	14	2.2
	Other	3	0.5
Who do you live with?	Alone	161	25.8
	Parents	272	43.5
	Friends	40	6.4
	Couple	89	14.2
	Other family members	58	9.3
	Another pet	5	0.8
Do you have a partner today?	Yes	395	63.2
	No	230	36.8
Number of sexual partners	0	7	1.1
	1 to 2	539	86.2
	3-4	75	12
	5 or more	2	0.3
Relationship time with your partner	0	230	36.8
	1 to 6	125%	20
	7-24	133	21.3
	25-48	67%	10.7
	More than 49	70	11.2

Variable	Final value	Frequency	Percentage
Occupation	Student	204	32.6
	Private Employee	43	6.9
	Unemployed	93	14.9
	Own business	20	3.2
	Public sector	22	3.5
	Professional	100	16
	Mid-level occupations	91	14.6
	Other	52	8.3
At what age did you start your sex life?	Under 10 years	8	1.3
	10 to 14 years	154	24.6
	14-19	381	61
	20-25	73	11.7
	26-59	9	1.4
Who did you have your first intercourse?	Friend	282	45.1
	Couple	204	32.6
	Family	57	9.1
	Unknown	82	13.1
Was it consensual?	Yes	580	92.8
	No	45	7.2

The study group characterized according to sociodemographic variables. Table 1 shows the descriptors for each variable. In terms of age, participants had a minimum age of 16 years and a maximum age of 66 years, with an average of 28.35 (SD 9.072). Age at onset of sexual life was 1.3% (8) under 10 years, 24.6% (154) from 10 to 14 years, 61% (381) from 14 to 19 years, 11.7% (73) from 20 to 25 years, and 1.4% (9) from 26 to 59 years. The onset of sex life was 92.8% voluntary (580) and 7.2% voluntary (45).

Table 2
Cronbach's Alpha

Reliability Statistics	
Cronbach's alpha **0.913**	**No. of items**
	25

The reliability analysis (Cronbach's Alpha) for the Sexual Satisfaction Index (SSI) was 0.913, i.e., the items are correlated with each other, due to the result that was a value approximate to 1, being reliable of the measured scale. Alpha values above 0.7 or 0.8 are considered to ensure the reliability of the SSI scale (Table 2).

Figure 1
Sexual Satisfaction Index
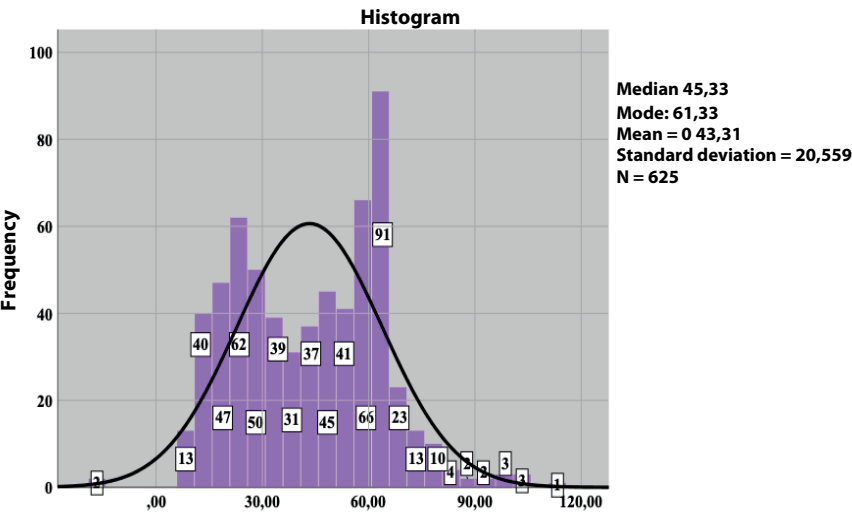
As for the score obtained in the Index of Sexual Satisfaction, the minimum was 9 points, the maximum 112, an average of 33.88 with a SD 19.24, and the histogram reflects a mode of 61.33, median 45.33, mean 43.31, with a SD 20.55.

Figure 2
Sexual Satisfaction Index
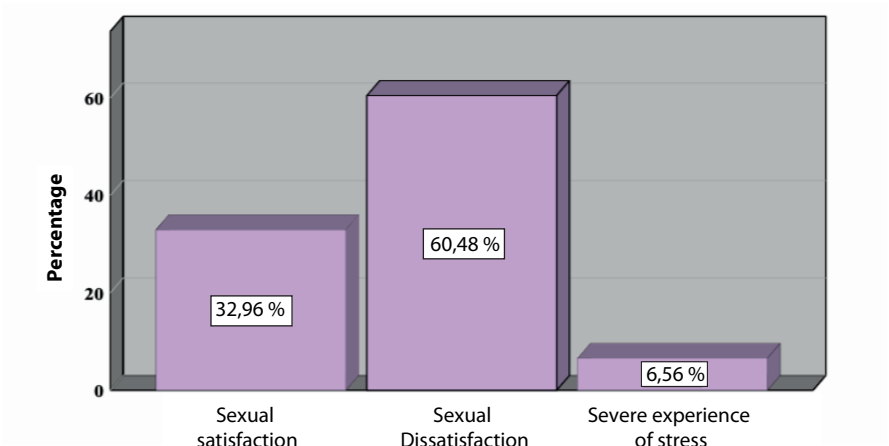
The LGBTIQ population has sexual satisfaction in 32.96% (206), sexual dissatisfaction in 60.48% (378) and 6.56% (41) have a severe experience of stress, possibly sexual coercion (Figure 2).

Table 3
Place of residence with SSI

Comparison of SSI averages in relation to place of residence				
Place of residence	**Average**	**N**	**Deviation**	**p-value**
Quito	40.93	440	20.19	
Cuenca	43.54	44	20.70	
Latacunga	59.42	12	10.79	
Guayaquil	50.40	29	19.64	
Ibarra	51.75	92	19.33	0,000
Amazon	47.33	4	11.17	
Galapagos Islands	31.33	1	Oh, yeah.	
Esmeraldas	54.33	3	2.65	
Total	43.59	625	20.34	

When correlating the place of residence with the SSI, the p-value < 0.05 (0.000) was obtained, which indicates statistically significant. The population residing in Latacunga showed a lower sexual satisfaction with an average of 59.42, while in the Galapagos Islands there was a higher sexual satisfaction, with an average of 31.33.

When comparing the couples living in Quito with those in Ibarra, it was found that those living in Quito have greater sexual satisfaction with a p value < 0.05 (0.000). It was also observed that couples living in Quito have greater sexual satisfaction compared to those in Latacunga, with a p value < 0.05 (0.006).

Table 4
Gender-related SSI

Comparison of ISS means in relation to gender				
Sex	**Average**	**N**	**Deviation**	**p-value**
Female	46.07	168	19.49	
Male	41.71	426	20.55	0.000
I'd rather not say	55.91	31	16.21	
Total	43.59	625	20.34	

The gender-related SSI yielded a p-value < 0.05 (0.000), being statistically significant: with more sexual satisfaction in men with a mean of 41.71 and less sexual satisfaction in those who preferred not to say with a value of 55.91. When comparing couples, there is more significance in men and those who preferred not to say with a p value < 0.05 (0.000) and women with a p value < 0.05 (0.014).

Table 5

SSI on sexual orientation

Comparison of SSI means in relation to sexual orientation				
What is your sexual orientation?	**Average**	**N**	**Deviation**	**p-value**
Homosexual	41.96	327	19.97	0.001
Bisexual	41.81	106	22.97	
Lesbian	48.71	136	19.11	
Trans	42.16	47	18.14	
Intersex	61.00	3	11.02	
Other	50.17	6	19.28	
Total	43.59	625	20.34	

As for sexual orientation, those who identified as Intersex have less satisfaction with a score of 61, followed by those who identified as another orientation with 50.17, lesbians with 48.71 and those who have more sexual satisfaction are bisexuals with 41.81 points. The significance between sexual orientation and the SSI yielded a p-value < 0.05 (0.001), and when comparing the two variables, there is greater correlation between sexual satisfaction in bisexuals in relation to lesbians with a p-value < 0.05 (0.013) and in homosexuals and lesbians with a p-value < 0.05 (0.001) (Table 5).

Table 6

Education and SSI

Comparison of SSI averages in relation to education				
Level of studies	**Average**	**N**	**Deviation**	**p-value**
None	47.74	22	20.79	0.000
Basic Education	56.69	28	17.70	
High school	48.22	164	18.73	
Superior	40.63	411	20.42	
Total	43.59	625	20.34	

When correlating between the level of studies and the SSI, there is a p value < 0.05 (0.000), being statistically significant. There is greater sexual satisfaction in those who have a higher education with a score of 40.63 and with less sexual satisfaction in those who have a basic education with 56.69. When comparing these two variables, higher education has more sexual satisfaction than baccalaureate with a p value < 0.05 (0.000) and higher education has more than basic education, with a p value < 0.05 (0.000).

Table 7

Ethnic self-identification in relation to the SSI

Comparison of ISS averages relative to the a-level How do you self-identify?				
How do you self-identify?	**Average**	**N**	**Deviation**	**p-value**
Mestizo	43.59	531	20.30	
Indigenous	55.75	17	16.00	
Afro-descendant	37.33	19	19.62	
White	40.46	41	22.48	0.047
Montubio	47.33	14	16.57	
Other	39.00	3	21.01	
Total	43.59	625	20.34	

Ethnic self-identification with SSI yielded a p-value < 0.05 (0.047), being statistically significant, with more sexual satisfaction in those who identified with another ethnicity with a score of 39.00, whites with a score of 40.46 and less satisfaction in indigenous people with a score 55.75 (table 7). There is no correlation between couples.

Table 8

SSI averages related to if they have a partner

Comparison of SSI averages related to if they currently have a partner?				
Do you have a partner?	**Average**	**N**	**Deviation**	**p-value**
Yes	42.09	395	21.23	
No	46.17	230	18.47	0.016
Total	43.59	625	20.34	

In the variable related if they have a partner, when relating to the SSI it yielded a p value < 0.05 (0.016), establishing statistical significance, with greater sexual satisfaction in those who are currently with a partner with a score of 42.09 and less satisfaction in those who do not have a current partner with 46.17.

Table 9

SSI in relation to the occupation

Comparison of SSI averages in relation to the current occupation				
What is your current occupation?	**Average**	**N**	**Deviation**	**p-value**
Student	37.97	204	18.50	
Private Employee	43.01	43	18.19	
Unemployed	53.60	93	17.37	
Own business	38.78	20	20.98	
Public sector	34.02	22	20.06	0.000
Professional	42.88	100	19.93	
Mid-level occupations	44.77	91	22.26	
Other	53.49	52	21.12	
Total	43.59	625	20.34	

The occupation and the SSI yielded a p-value < 0.05 (0.000), being statistically significant, with greater sexual satisfaction in students with a score of 37.97 and with less sexual satisfaction in the unemplo-

yed with 53.60 points (table 9). When comparing the two variables, students have more sexual satisfaction than unemployed people with a p-value < 0.05 (0.000), and those working in the public sector with unemployed people with a p-value < 0.05 (0.001).

Conclusions and discussion

Limitations of study

The online application of the questionnaires promises us anonymity and confidentiality, rather than traditional data collection; however, participation conditions can increase forgery, incomplete data, and self-selection bias. Access to this population is difficult, because when they were asked to participate, most of them generated a negative reaction, defensive or afraid of being subjected to violence, which they mentioned at some point in the data collection, as mentioned by Pérez (2012). Therefore, by having affinity with certain groups, associations, communities, leaders, foundations or being a participant in a gay disco, places where feelings, attitudes are hidden and allows them to be free from a discriminatory society, facilitated data collection.

Cronbach's Alpha showed a good internal consistency between the items and the validity of the construct, obtaining a similar score to Santos (2009).

In the population studied, the relationship between sexual satisfaction with: age in groups, place of birth, marital status, the person they live with, number of sexual partners, time of relationship with the partner, beginning of sexual life, the person they initiated sexual life and if it was consensual, showed there were no statistically significant differences with a p value > 0.05 (Otis *et al.,* 2002). In contrast to what was mentioned in the study Sexual identity and partner satisfaction in gay men in metropolitan Lima, subjects living with families reported greater partner satisfaction as the other socio-demographic variables mentioned (Pérez and Wilcht, 2017).

Regarding Hudson scale of sexual satisfaction when relating it to sex, in the Spanish population (Santos, 2009) states that the overall score was not different between men and women. On the other hand, research on the prediction of sexual satisfaction in men and women carried out in Mexico, according to Moral (2011), indicates a slight dissatisfaction in women than

in men. This finding is confirmed in the study due to a higher Sexual Satisfaction Index (SSI) in men than in women (Pöge, 2020; Wang *et al*., 2021).

In the studied population, the onset of sexual life is not correlated with sexual satisfaction in those who initiated with their friend, as referred by Luttges *et al. (*2019) without statistically significant differences.

When applying the Index of Sexual Satisfaction, the groups under study had a statistical correlation with the highest level of education, a conclusion that was also reported by Santos *et al.* (2009).

People with partners have higher levels of sexual satisfaction according to the groups studied by (Ortiz *et al.,* 2002; Alemán, 2018), the more sexual partners the more sexual satisfaction, and there is no relationship between sexual satisfaction and marital status, as discussed in Botello and Guerrero (2018).

The aim of the research was to fill a gap in the existing knowledge regarding the sexual satisfaction of the LGBTIQ population, based on a bio-psycho-sociocultural approach, addressing the concept of health as a state of well-being and integral satisfaction from the context of sexuality.

The analysis of the results shows the need to promote research on the diverse population in all areas related to sexual health, since rapid social and cultural changes modify the sexual behaviors of people with discrimination, social prejudices, lack of access to health care services and timely support in therapies, counseling, education projects at all levels, so that they accept and respect people who think and act differently in a heteronormative society.

This research study has presented aspects related to the sexuality of LGBTIQ groups, which remained hidden due to fear of their members. The reality that we live in today determines that Ecuadorians accept the existence of these groups and think that heterosexual culture is not the only one that must be present in our reality, for which professionals related to health sciences: doctors, obstetricians, psychologists, sociologists, sexologists, educators join efforts to change the current paradigm.

In conclusion, it is relevant to continue researching about sexual satisfaction in the diverse populations of all existing groups at the national level, expressed in the same way in MSP (2017).

This will allow us to understand the needs and the supports required in safe and respectful environments. It is also essential to analyze the factors that negatively influence their sexual health due to the constant acts of discrimination they face due to their orientation, as indicated by Abaver (2018), Tyler *et al.* (2022) and Gavin (2022).

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Perspectives of Sociology
in the portuguese-speaking african countries

Perspectivas de la Sociología en los países africanos de lengua oficial portuguesa

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Abstract

This research examines some of the challenges faced by the African Countries of Portuguese Official Language (PALOPs) in consolidating Sociology as a relevant area of knowledge, both in the university and school settings. The justification lies in the lack of studies on African Sociology and the limited cooperation between Brazil and these countries in this field of knowledge. In these emerging nations, both the university and this knowledge area are new and lack institutionalization. The lack of investment in education by the State and linguistic obstacles make the process even more challenging. To address this, a hypothetical-deductive methodology will be employed, using some of the limited bibliographies on the subject, as well as structured and semi-structured interviews with African teachers and students. The results demonstrate a significant potential for cooperation between countries and a mutual willingness to understand what is academically produced. The initiatives already developed indicate the possibility of positive exchanges among teachers, researchers, and students. In conclusion, the article points out that Sociology has a crucial role to play in Africa. In the PALOPs, Brazil is viewed as a major partner in the academic context but is considered less relevant in its potential. Thus, the prospect of closer collaboration is deemed healthy and necessary due to Sociology being a new area of knowledge in African countries.

Keywords

Sociology, PALOPs, university, decoloniality, cooperation, Brazil, teaching practice, development.

Resumen

La presente investigación analiza algunos de los desafíos enfrentados por los Países Africanos de Lengua Oficial Portuguesa (PALOPs) en la consolidación de la Sociología como un área de conocimiento relevante, tanto en el ámbito universitario como escolar. La justificación radica en la falta de estudios sobre la Sociología africana y la escasa cooperación existente entre Brasil y estos países en este campo del saber. En estos países en desarrollo, tanto la universidad como esta área del conocimiento son nuevas y carecen de institucionalidad. La falta de inversión en educación por parte del Estado, la estructura precaria, las dificultades de cooperación académica y los obstáculos lingüísticos hacen que el proceso sea aún más desafiante. Como metodología hipotético-deductiva, se utilizarán algunas de las escasas bibliografías sobre el tema, así como entrevistas estructuradas y semiestructuradas con profesores y estudiantes africanos. Los resultados demuestran que hay un gran potencial para la cooperación entre los países y una voluntad mutua de conocer lo que se produce académicamente. Las iniciativas ya desarrolladas señalan la posibilidad de intercambios positivos entre profesores, investigadores, estudiantes y formuladores de políticas públicas. En conclusión, el artículo señala que la Sociología tiene un papel importante que desempeñar en África. En los Países Africanos de Lengua Oficial Portuguesa (PALOPs), Brasil es visto como un gran socio en el ámbito académico, pero poco relevante en su potencialidad.

Palabras clave

Sociología, PALOPs, universidad, descolonialidad, cooperación, Brasil, práctica docente, desarrollo.

Introduction

The Social Sciences in Africa have played a crucial role in understanding and analyzing the social, political, cultural and economic dynamics present on the continent. Africa's rich ethnic, linguistic and cultural diversity, together with the historical and contemporary complexities, make the Social Sciences play a vital role in the contextualization and interpretation of African experiences. Colonial history has played a significant role in shaping African societies, profoundly influencing social and political structures. The Social Sciences in Africa have been devoted to examining and dismantling the consequences of colonialism, including its ramifications today, such as socioeconomic inequalities, ethnic tensions, and differences in access to resources and political power.

Our method was scientific research with literature review and interviews (structured and unstructured) with students and teachers of PALOPs. Sociology is a new area of knowledge in the young African Countries of Portuguese Official Language (PALOPs), which have also had the creation of universities as something very recent. Its development is imperative to seek cooperation with other countries. Brazil, with a common language and past, should be a privileged actor in this cooperation, but it is not the case. Despite the fact that the development stage of this area is different between countries, common problems and challenges are observed. The Brazilian experience in the field of Sociology, mainly with regard to institutionalization, whether in the university or school context, can serve as a stimulus and impulse for the development of Social Sciences in PALOPs. Decolonial thought inspires us in the production of the article, since it criticizes the perspective of the modernity of knowledge linked only to Eurocentric or American thought. Latin and African countries are not considered relevant partners in the construction of knowledge.

The work is inserted in the fight against the monoculture of knowledge. It is necessary to legitimize and give voice to other knowledge. Democratize knowledge. Deconstructing education. It is in this way that decolonial thinking seeks to topple the coloniality of knowledge, which is maintained with contempt for the knowledge of the oppressed and historically marginalized peoples in Brazil and Africa. It is in the "ecology of knowledge", to bring the concept of the Portuguese author Boaventura Sousa Santos, the dialogue between the various knowledge that can be considered important for the advances of social struggles. Hence, the epistemologies of the South are sought, which can be defined as a set of knowledge produced and validated based "on the experiences of all social groups that have been systematically victims of injustice, oppression and destruction" (Santos, 2019, p. 17) caused, among other factors, by colonialism.

Sociology contributes to the decolonization of knowledge by challenging Eurocentric perspectives and promoting the inclusion of African voices in the production of sociological theories and understandings. Another relevant aspect is that, with the rise of democratic movements in many African nations, Sociology plays a fundamental role in analyzing the processes of democratization, civic participation and governance. It also highlights the importance that Sociology in Africa has in understanding the interactions between education and development. Analyzing the role of education in promoting equality, inclusion and economic development is an area of great relevance.

Sociology in Africa is closely linked to the analysis of social movements and resistance, from colonial times to contemporary movements. This includes the fight against oppression, racism and the pursuit of social justice. In this context, it is also included that this knowledge facilitates intercultural dialogue by promoting mutual understanding between different ethnic groups, religions and communities in Africa. This is crucial to foster social cohesion and mitigate conflict. Africa has experienced significant social, political and economic changes over time. Sociology helps document and understand these transformations, providing insight into the drivers and consequences of social changes in the region.

In the first part of the work, emphasis will be placed on the adversities to develop sociology in the African countries of official Portuguese language. This area of knowledge is new in these countries and lacks institutionality. Issues such as infrastructure, financing, persecutions, coloniality of knowledge, among other aspects, will be present. Next, the reflection on decoloniality in the African context. Inspired by intellectuals such as Brazilian Paulo Freire and Frantz Fanon (born in Martinique), decolonial authors point out the need to produce knowledge with the eyes of Africa and the African, thus avoiding the continuation of a coloniality that thinks about the continent and its people with the Eurocentric colonialist vision. And finally, the perspectives of Sociology in PALOPs. In this last point of the article, results of the investigations are presented, with possible ways to follow for the development of this important area of knowledge.

Methodology

Sociology in PALOPs and their adversities

There are challenges faced by the Social Sciences on the African continent. The objective of the research is to understand how sociology teaching works in PALOPs and, with it, to cooperate in the exchange of academic products, such as conferences, workshops, seminars and research material. The work is ongoing, as it is a process that requires follow-up.

Sociology in PALOPs is undervalued and underfunded in countries. Many research projects are funded by international agencies, which determine the agenda of these studies by geopolitical and strategic issues of these countries.

According to Angolan researcher Cesaltina Abreu, most civil society groups and organizations in Africa depend on the international community for funding, and even the approval of their action programs, ending up uncritically incorporating concepts and practices, without the necessary reflection on their adaptation to the context in which they are going to be applied (2006, p.117). According to the sociologist and professor of the Lusophone University of Guinea, Diamantino Lopes (2020), the State or Government does not invest in higher education and scientific research, and this field is covered by international organizations, due to the need to deepen knowledge or understand a given phenomenon. As the African philosopher Paulin Hountondji (2008) points out, African social scientists must realize that they are conducting research oriented by external interests, with the intention, first and foremost, of satisfying the interests of the North.

The fragility of democracy and democratic institutions in Lusophone Africa also impacts the lives of sociologists. Many social scientists feel persecuted by the state, society and the family. According to Lopes (2023), in the reality of Guinea-Bissau, persecution manifests itself when the intervention is based on criticism of poor governance, corruption or nepotism. Many social scientists choose silence (or self-censorship) to avoid such persecutions, given the multiplicity of risks they face, including job loss and even physical violence, as in the case of Guinean journalist António Aly Silva. Not only do teachers feel persecuted or have their freedoms curtailed, there are also reports of students wanting to address certain academic issues. The case of Paulo Estefane, from the University of Licungo, in Beira, is mentioned, who was inhibited to address Montesquieu's theme on the division of powers due to the difficulty of working on this issue in the political context of Mozambique, where such division is not clear in practice (LEPECS, 2023).

Research infrastructure is precarious and requires increased investment. According to researcher Maria Paula Meneses, universities rely heavily on international funding for their operation, and state universities compete on unequal terms with local and international private universities, thus maintaining the peripheral status of African public universities as a reality (2016, p. 350). Carlos Cardoso, a researcher at the Council for the Development of Social Sciences Research in Africa (CODESRIA), based in Dakar, agrees with Meneses and highlights that these higher education institutions present a dubious quality, even with the lack of motivation of teachers (2017, p. 91). The researcher points out that the participation of lusophone African researchers in

the activities of CODESRIA, especially those aimed at postgraduate students, is limited. This reflects the poor development of the higher education system in general, as well as that of social science research institutions. Lusophone presence in CODESRIA programs has little expression (2017, pp. 94-97).

The impact of neoliberal policies from the 1990s also contributed to the weakening of higher education in PALOPs. Cost reduction in education affected the quality of teaching and research, as well as curricula. According to professor and researcher Teresa Cruz e Silva, in Mozambique, as in other African universities, curriculum reforms in public universities in the late 2000s imposed and "sold" the Bologna Process as an inevitable means to meet the demands of integration into the more global processes of education systems. These reforms were marked by the marginalization of local social actors, with negligible public consultation. The challenge of academic autonomy is tested when market-oriented neoliberal policies come into play in education.

African academic productions are not absorbed by governments, and much of it is published in Western journals. Brain drain is an African reality. According to Lopes (2020), the impact is devastating, as Guinea-Bissau has people trained in various sectors of activities scattered around the world, unable to contribute to the development process. Although it is discussed in academic forums, according to the professor, there is no concern on the part of political leaders.

Thinking about Africa from the Western perspective is a big mistake. The concepts introduced are produced in the West. It is the coloniality of knowledge that is intended to combat. It is essential that the Social Sciences on Africa be produced by Africans.

The institutionalization of Sociology in PALOPs seems to be a great challenge. According to Professor Adérito Manuel of ISCED, Sociology in Angola went from being an ignored and forbidden discipline after independence, to being recognized and promoted. From 1991/1992 (Second Republic), Sociology began to be recognized in Angola by the democratic State, by the proclamation of the Angolan Association of Anthropologists and Sociologists (Costa, 1997, pp. 94-96), by the publication of research works by sociologists and other social scientists in the public space, by becoming one of the disciplines of secondary education courses, by its university institutionalization as a discipline, bachelor's, master's and a specialty in the doctorate of Social Sciences, and by the participation of sociologists in scientific events (national and international) (Kajibanga, 2009, pp.197-20 1).

On the other hand, while the emergence of Sociology in the country was beginning to come true, difficulties also arose. Adérito Manuel (2022) mentions the difficulties of access to works by teachers, including didactic works. The production on the teaching of Sociology in Angolan schools and universities is scarce, being very difficult the elaboration of this material and with a very high cost. The few academic journals that emerged, such as the Angolan Journal of Sociology, had a short life span and lasted from 2008 to 2014. The professor acknowledges the lack of organization of Sociology in the country, including in seeking cooperation with other countries. According to professor Antonieta Ortet (2022), from the University of Cape Verde, the production of teaching material on Sociology in the country also depends on manuals from abroad.

In addition to the lack of regularity in the production of academic journals of Sociology in the Portuguese-speaking African countries, Cardoso points out that many studies remain monographic or ethnographic. Others are full of empirical data and often numbers, without an intelligible relationship between them or without proper reading between the data. The researcher points out that there is often a lack of a theoretical framework that bases the analysis (2017, p.102). More postgraduate courses need to be strengthened and created, and methods of analysis and theoretical support as a research tool need to be refined. The scarcity of scientific activities in the field of Social Sciences in PALOPs should be a cause for concern.

According to Angolan professor Felipe Morais, scientific associations play a crucial role in the development of science. The author urges a greater effort by the actors of Angolan Sociology to take responsibility for creating the ethos of science (2023, p. 81). In this sense, the active presence of students in the construction of this institution is essential. This is what the Community of Sociology Students of Angola (COESO) thinks. According to the current president of the institution, António Arnaldo (2023), COESO seeks to strengthen the Social Sciences, especially Sociology, without forgetting the interdisciplinarity and complementarity of the Social Sciences through various activities and scientific research.

It is important to encourage students to create their Sociology communities in their countries and, perhaps boldly, to create the Lusophony Student Community, with the aim of cooperating between countries in the academic field. Undoubtedly, this will have a reflection in the search for the institutionalization of the area in the various realities. A fundamental agenda is the implementation of school sociology as a compulsory discipline in secondary

education in countries. It is present and offered in Angola in all areas of secondary education as an optional. In Cape Verde it is offered in the Humanities area, in the 12th year of schooling. In Guinea-Bissau, Sociology emerges in the area of Social and Human Sciences, also in the 12th year. In Mozambique, Sociology is not offered in schools in the country. In São Tomé and Príncipe, sociology is in the last three years of secondary education. It should be believed that, following the Brazilian example, strengthening school sociology is an important step to strengthen the area of knowledge in university education.

It also reflects on the challenge, to a large extent, of the presence of the "colonial library", a term introduced by Valentin Mudimbe (1988). According to the Congolese philosopher, most of the work done on Africa reflects Eurocentric references, narratives about the continent whose roots developed during the colonial period. This knowledge still forms the hard core of knowledge deposited in libraries and taught at universities around the world about Africans and Africa. According to Mudimbe, these works and the representations they contain contributed to "inventing" Africa as a space of difference and inferiority (1998, p. 208). The "African library" needs to be expanded, with African authors reflecting on the continent and its diversity.

Black American thinker Bell Hooks, in her book *Teaching transgression* (2019), argues that education as a liberating practice is one that aims to know what is "beyond the borders of what is acceptable", creating new visions. To this end, an epistemological proposal that criticizes hegemonic thinking and its intended universality, such as decolonial and its immense internal variety, presents as a fundamental starting point in the attempt to create an education that increases the capacity to be free (2019, p.13). In this way, in these brief words, the article sought to reflect on important challenges and some paths that exist to consolidate Sociology as an area of relevant knowledge among the African Countries of Portuguese Official Language (PALOPs).

Thinking about decoloniality in the African context

Reflecting on the work of the teacher and researcher, both in the school environment and at the university level, is an important task for any teacher who seeks to improve their work activity. Constantly thinking about their practice, seeking to update themselves is fundamental in their pedagogical

commitment, even questioning the contents taught and the curricula, which are political decisions loaded with ideologies.

In this way, we question what is the interest in deconstructing the classical curricula. It is important to make it clear that we understand the importance of the political dimension in the field of education; therefore, curricula represent disputed political arenas when it comes to content construction. In other words, the selection of themes and their arguments are relevant ideological objects. Thus, it is easy to perceive that knowledge produced outside the European/Western context has never been valued in either Brazil or African countries.

Even with African independence and numerous intellectual debates, a colonial perspective continues to dominate the global North's policy toward the African continent. Researcher Maria Paula Meneses (2016) states that a detailed reading of this process allows us to see that imperial policies were, essentially, reformulated, maintaining the hegemonic conception of the North over the South.

Likewise, decolonial thinking helps us to understand that curricula are products of a historical context with different times and spaces and are often produced in a disobedient way (knowledge, dialogues, emotions, for example). If our identity carries with it not only individual but also collective memory, we can understand that subordinate groups such as Africans, Latinos and indigenous peoples are still seen as barbarians. I mean, not modern. The colonial vision persists in the form of contents, curricula and in educational practices in the educational daily life. It is the vision of the coloniality of knowledge.

In his work "Letters à Guiné-Bissau", Paulo Freire recounts experiences of his visits to that African country with the purpose of making the local population literate without the perspective of colonialist education, "(...) because Guinea-Bissau does not start from scratch, but from its cultural and historical sources, from something proper, from the very soul of its people, which colonialist violence cannot kill" (Freire, 1978, p.10). The author himself also points out that "(...) inherited colonial education, whose main objective was the 'de-Africanization' of nationals, discriminatory, mediocre verbalist..." (1978, p.15). Freire identified in the liberation struggles the political and also cultural emancipation of the Guinean people. In this way, he sought to overcome the oppressive past by looking at the very reality, multiple and complex, of the population of that African country. The silencing of memories is a consequence of colonialism, which the author intended to combat.

In this way, it is necessary to have counter-narratives. Seek the balance of knowledge. Legitimize other knowledge. Education must combat prejudice of any kind type, and how it can work in this deconstruction if it often becomes the legitimizer of traditional curricula. Tradition, in this case, is often folklorized in books.

Some public policies in Brazil emerged and were important in this attempt at deconstruction. The African History in Schools Act brought important elements to the school environment, mainly in terms of teaching materials, but it was insufficient and little changed the reality in institutions. Another example is Afro-centered education, which is an educational approach that places African culture and Afro-descendant experience at the center of the learning process. This educational paradigm seeks to incorporate and valorize the knowledge, history, traditions and perspectives of African and Afro-descendant communities.

It is necessary to look for other knowledge. It is essential not to prioritize intelligence. Traditional knowledge, seen as common sense, reflects the Eurocentric vision, still strongly persistent in the Brazilian and also African educational environment.

Democratize knowledge. Deconstructing education. This is how decolonial thinking seeks to topple coloniality, which is sustained by contempt for the knowledge of oppressed and historically marginalized peoples in Brazil and Africa.

It is epistemological racism that must be attacked. Non-European knowledge must not be inferiorized. It is in the "ecology of knowledge", to bring the concept of the Portuguese author Boaventura Sousa Santos, the dialogue between the diverse knowledge that can be considered important for the advances of social struggles. In this way, we will combat monocultural hegemony of unique pattern, androcentric (predominance of male culture) and linked to whiteness. Subalternated voices must be recognized in everyday life, especially in the day-to-day of education. This is because we easily perceive features of coloniality in the school or university environment. The epistemologies of the south are a set of epistemological interventions that denounce the suppression of the innumerable ways of knowing of the peoples and nations that were subjected to the colonization process (Santos and Meneses, 2009, p.13).

In this way, we observe a kind of cultural genocide that silences voices, narratives, cultures and knowledge. It is the idea of the epistemology of the

north, the reproduction of the knowledge of the victors either in school or in university. It is the Eurocentric reading of the production of knowledge. According to Zulma Palermo:

> Opting for a decolonial position that exercises resistance to this state of affairs, implies locating oneself in a place of undoubted intellectual struggle and also means the need to debate with other ways of conceiving resistance to domination by power. (Palermo 2010, p. 50)

It is understood that, to transform reality, advises Mignolo (2008), it is necessary an "epistemic disobedience" that questions the hegemonic patterns of knowledge production, which have become dominant by marginalizing, silencing and delegitimizing diverse knowledge, such as those of African and Latin intellectuals.

There are resistances that must be exploited, such as examples of anti-racist, Afro-centered education and affirmative action quota policies in Brazil, the theory of decoloniality that was born in Latin countries, and the social activists who are growing up in the PALOPs. In this way, we seek that decolonial gap, a fissure in the system that allows us to work with other knowledge. It is in the struggle that the knowledge of the vanquished is produced.

Results and conclusions

Perspectives of Sociology in PALOPs

As seen before, despite progress, the Social Sciences in Africa face significant challenges, including a lack of adequate funding, limited infrastructure, and the need to strengthen local research and teaching capacities. Overcoming these obstacles is critical to fostering robust and relevant research that can inform policies and practices for sustainable development and social justice across the African continent.

Greater cooperation between countries through congresses, workshops and other academic events is essential for the development of this important area of knowledge. The Luso-Afro-Brazilian Congress is an important initiative, but it still fails to bring together a significant number of social scientists. Institutional investment in humanities research is essential. The num-

ber of meetings between sociologists in PALOPs is insufficient. Expanding knowledge by participating in a larger number of university events will certainly increase the number of projects and academic products among countries.

In this context, it is also important to seek greater support from the Council for the Development of Research in Social Sciences in Africa (CODESRIA) and to strengthen the experience of the University of International Integration of Afro-Brazilian Lusophony (UNILAB).

The Brazilian experience in the obligatory of Sociology as a curricular discipline in secondary education can serve as an important support for the increase of this area of knowledge in PALOPs. As a result of this obligation, employment opportunities for teachers, material production, congresses and other academic activities were expanded. Sociology grew stronger, even at the university level. The further institutionalization of Sociology in Lusophone Africa also goes through the expansion of this area into secondary education.

Students have a fundamental role in strengthening the Social Sciences in PALOPs. The experiences of the Community of Sociology Students of Angola (COESO) and the Nucleus of Afro-Brazilian Studies of the Teaching of Sociology (NEABES/UERJ) show how important it is to fight together. Seeking greater outreach among students in the context of Portuguese-speaking countries is critical and will surely have a positive impact on the quality of courses.

There is surely a growing demand for interdisciplinary research that addresses complex issues such as poverty, inequality, governance, sustainable development, and social justice. With continued investment in education, research, and institutional development, these countries may strengthen their capacity to produce relevant knowledge and innovative solutions to local and global problems.

Cooperation between Portuguese-speaking countries can also play a crucial role in promoting academic exchange and the advancement of Social Sciences in the region. The exchange of experiences, the offer of workshops and events, including the exchange of academic materials and products, is part of the cooperation. It is essential to prevent brain drain, giving priority to the assessment of vocational training.

The broadening of the participation of civil society is essential to seek the improvement of democracy and the formulation of public policies in education. African sociologists have much to contribute in this regard. At this point, liberties need to be expanded.

It is also important to value and preserve national languages, including from the perspective of oral tradition, which remains a significant part of the

cultural heritage in many African communities, highlighting the diversity and richness of forms of communication and knowledge transmission, included in the educational field of the continent.

The possibility of learning in local/national languages is the most important step in education to demarginalize and demystify local knowledge (Meneses, 2008, p. 356). Although Portuguese is the language of the colonizer, it should not be underestimated by its global reach and its various potentialities. The results obtained with the research contribute with valuable findings for the analyzed topic, especially considering the scarce previous research on the subject. This allows information to be provided to open new lines of inquiry.

Sociology plays a fundamental role in Africa, providing a deeper understanding of social dynamics, challenges and possible solutions to promote sustainable development and social cohesion. However, efforts are needed to achieve a greater presence of this area of knowledge in the curricula of schools and universities. This article seeks to encourage PALOP sociologists in this important initiative.

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Discourse and framing strategies of the media in the Peruvian second electoral round (2021)

Estrategias de discurso y framing de los medios de comunicación en la segunda vuelta electoral peruana (2021)

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Abstract

This research analyzes the discourse and framing strategies used by the Peruvian media in the second round of the national electoral campaign. For this purpose, a quantitative analysis methodology was used, through the construction of a database with all the news about the second round of the 2021 presidential elections that appeared in the main national media and disseminated on Twitter (actually X). The main finding is that even though the coverage of the second electoral round can be considered mostly neutral, there was a differentiated informative treatment regarding the candidacies of Castillo and Fujimori, favoring a negative and conflictive framing of the former over his opponent. The context reported reflects that the second round of the presidential elections took place under a climate of political polarization as a consequence of the generation of speeches and narratives that have generated wide margins of distrust and a "friend-enemy" logic that has had consequences in current Peruvian politics.

Resumen

El presente trabajo de investigación analiza las estrategias de discurso y *framing* utilizadas por los medios de comunicación peruanos en la segunda vuelta de la campaña electoral nacional. Para tal efecto, se utilizó una metodología de análisis cuantitativo, a través de la construcción de una base de datos con todas las noticias sobre la segunda vuelta de las elecciones presidenciales de 2021 aparecidas en los principales medios de comunicación de alcance nacional difundidas en Twitter (actualmente X), teniendo como principal hallazgo que aun cuando la cobertura de la segunda vuelta electoral puede ser considerada en su mayoría como neutral, existió un tratamiento informativo diferenciado en torno a las candidaturas de Castillo y Fujimori, privilegiándose un encuadre negativo y conflictivo del primero sobre su contendora. El contexto relatado refleja que la segunda vuelta de las elecciones presidenciales se desarrolló bajo un clima de polarización política como consecuencia de la generación de discursos y narrativas que ha generado amplios márgenes de desconfianza y una lógica de "amigo-enemigo" que ha tenido consecuencias en la política peruana actual.

Palabras clave

Discurso, elecciones, enmarcado, noticias, polarización, candidaturas, Twitter.

Introduction

In 2021, Peru held presidential elections, the results of which proclaimed Pedro Castillo Terrones constitutional president of the republic for the period 2021-2026. These elections meant the continuation of democracy in the country since the fall of the Fujimori regime in 2000. Although it is true that in 2020 Peru suffered a democratic crisis caused by the conflict between the Executive and the Legislative Power that led to the resignation of former President Martín Vizcarra, who was replaced by Francisco Sagasti, these events did not mean a break from the national democratic regime (Paredes and Encinas, 2020; Dargent, 2019).

The national elections were held in a climate of polarization (Campos, 2021; Helbig and Hügel, 2021; Fowks and Quezada, 2021; Falcón, 2021) and political fragmentation that confronted in the second round of the elections the representative of the "Popular Force" party, Keiko Fujimori Higuchi, daughter of former president Alberto Fujimori, with the left-wing candidate

Pedro Castillo Terrones, representative of the political party "Peru Libre", a rural teacher and the leader of the national teachers' strike that began in 2017.

The performance of the media in the coverage of these national elections was repeatedly questioned by public opinion and branded biased by the majority of citizens. Indeed, according to a survey conducted by the Institute of Peruvian Studies in June 2021, 70% of the population believed that the media was favoring a candidate, with 84% of the population considering that they supported Keiko Fujimori and only 10% Pedro Castillo (IEP, 2021).

This public perception agreed with the conclusions of the report of Electoral Experts of the European Union (2021) which, in the analysis of the media and electoral content in networks during the presidential elections, stated the existence of:

> Clearly biased coverage of the presidential runoff campaign by most private media [which] favored Fuerza Popular and undermined voters' right to receive balanced information […]. (Misión de expertos de la Unión Europea, 2021, p. 23)

The situation described is more worrying when considering that there are systematic and repeated complaints in Peru over time regarding the existence of a high concentration of media led by El Comercio Group (Ojo Público, 2016; Gargurevich, 2012; Santillán, 2017). There is no doubt, therefore, that the study of the media is a relevant issue to Political Science, either as fundamental actors in defense of the rule of law or as relevant actors in the construction of the so-called media power that seeks to position and influence the topics discussed in the public agenda. The position of the media in today's democratic societies becomes even more crucial due to the context of citizen distrust that encompasses democratic institutions, whether it be official public institutions and state powers, as well as political parties and the press in general. Regarding the latter, we should add the Latin American context characterized by historical situations of concentration around media ownership and media power (Mastrini and Becerra 2017; Gonzales, 2020).

Hence, this paper aims to answer the following research question: What were the strategies of *framing* and discursive treatment provided by the media in the second round of the Peruvian electoral campaign in the scenario of political polarization during the national elections?

Likewise, the general and specific objectives are as follows:

- General objective: to determine what were the strategies of *framing* and discursive treatment provided by the media in the second round of the Peruvian electoral campaign in the scenario of political polarization during the national elections.
- Specific object 01: to describe and analyze the media coverage used by the media during the second round of the Peruvian electoral campaign.
- Specific objective 02: to examine the *framing* and discursive treatment strategies that the media used during this campaign to inform public opinion.

Theoretical framework

Speech and media

Starting from a constructivist approach, it is essential to examine through the construction of discourses, how the media contribute to the creation of representations that affect the social imaginary, giving rise, for example, to aspects related to the construction of news (Van Dijk, 1990). The analysis of discourse emerged with authors such as Stuart Hall (1997) and Teun Van Dijk (2009), who argue that the construction of narratives constitutes an exercise of power through which representations of reality are disputed. Because discourse is a fundamental tool that legitimizes representations that serve to maintain domination and inequalities, Van Dijk (2009) proposes a critical analysis of discourse through which attention is paid to those properties of discourse that are related to the expression, confirmation and reproduction of the social power of those who hold power.

Speech above all is a linguistic construction that is expressed through the signifier in oral or written reality. Hence, it is the word or set of words to which we associate the discursive expression. The determinant for the critical analysis of discourse is to determine the construction of meaning, i.e., the ideal representations that the signifier generates in the "mentalities" of people. Hence, it is evident that discursive construction is a space of political struggle in society (Errejón, 2012).

What is the relationship between media and speech? As discourse is a tool for the construction of realities and a space for the struggle for the granting of meanings, the media stand as relevant actors in the dissemination of

information, which is manifested through the creation and construction of discourses. Thus, following Van Dijk (2009) it is considered fundamental to understand who are the agents who have an active position in the creation of the speeches. In the case of the media we are facing one of the most influential forms of public discourse construction, for which it is crucial to ask questions such as:

> Who has access to (production of) press news or television programs and who controls that access? Who can organize press conferences that many journalists will attend? What press releases are being read and published? Who are being frequently interviewed and quoted? Whose actions are defined as news? To whom do the opinion or readers' letters that are being published belong? Who can participate in a TV show? And, more generally, who is responsible for defining the political and social situation that is accepted and taken seriously? (Van Dijk 2009, p. 31)

In the speeches broadcast from the media through journalistic work it is necessary to consider the creation of the news, the context in which they are broadcast, the way in which they are presented, what they want to transmit and represent, as well as the impact they generate on public opinion (Van Dijk, 1990). Hence, it is stated that the analysis of discourse is an interdisciplinary tool, not being properly a method of analysis, but an academic practice that can lead to the use of various methodologies that contribute to the determination of senses and representations (Van Dijk, 1990; Meyer, 2003). Considering the aforementioned, from the methodological level the analysis of the discourse uses various tools ranging from the selection and collection of data and the interpretation of the texts to procedures such as surveys or studies from various texts that could be considered a sample (Meyer, 2003).

Media and *framing*

The theory of *framing* emerges with Goffman (2006), whose work theorized the discursive framing on various aspects of "the social". For Goffman, frames of reference contribute to making sense of the representations we make through the endowment of meaning. The social is built not only by objective material reality, but also by the frames of reference on which we interpret and value actions.

Goffman's theoretical contribution resulted in the social sciences using his postulates to understand the so-called framing acts, i.e., those acts that seek to frame certain actions or discourses. It has also been affirmed that the analysis of frames from political science constitutes a particular modality of analysis of political discourse (Viejo Viñas, 2008), since it contributes to the analysis of the political production process of ideological narratives, being that the object of the analysis of frames is to recognize the subjective character of the political discourse instead of attributing some form of objectivity to it.

Just as frame theory has been used to understand contentious politics and collective action, it is worth mentioning that it has also been used to analyze the content disseminated by the media and the speeches of political actors. Starting from the existence of various frame-discourses in society, the presence of master frames is highlighted, reflected by discourses that have a greater power and influence, being one of the master frames to which those provided by the media are referred (Viejo Viñas, 2008). In the field of political communication, this theory has been used to analyze the content disseminated by the media concerning the criteria of selection, treatment and analysis of news. It is possible to relate this postulate with the one pointed out by Van Dijk (1990) for whom the construction of information and news follows certain criteria that can be unveiled through the analysis of discourse in order to find the ideological and political factors that have motivated their selection, treatment and dissemination.

The *frame analysis* does not only focus on the analysis of news construction (*frame building*). In fact, although it is true that one of the most outstanding aspects of *frame analysis* has been focused on investigating how the construction of information is generated, the *frame analysis* has also been used to know the effects that the selection of news and information through the frame has on citizens and public opinion (*frame-setting*). Hence, to analyze the results of the *framing* carried out by the media in the citizenry to investigate if these actions have had a level of impact on public opinion (Piñero-Naval and Mangana, 2018). From the aforementioned, two fundamental aspects of *frame analysis* are considered: i) the analysis focused on the construction of news and information, through the study of the frames, the selection criteria and the presentation, known as the *frame-building* and ii) the analysis of the effects and the influence that the presentation of information and news have on the citizenry and public opinion, known as *frame-setting* (De Vreese, 2005).

However, starting from the analysis of contents and the strategies of framing the discourse of information, we can point out that there are various classifications on the types of framing. In general, perhaps the most used work is that of the types of frames proposed by Semetko and Valkenburg (2000), who taking into account the various studies carried out in the framework of the communication on the types of *framing* in the United States and Europe, assume the existence of five types of framing that are common when presenting news: conflictive/economic/moral/emotional/responsibility, whose first four will be used in the analysis of media coverage in this research work.

Materials and method

Methodological design

As pointed out in the introduction, we ask ourselves the following research question: What were the strategies of *framing* and discursive treatment provided by the media in the second round of the Peruvian electoral campaign in the scenario of political polarization during the national elections?

This research question has a general objective and two specific objectives, which will guide the development of this work. In this regard, three hypotheses have been formulated:

- Media coverage in the second round of the Peruvian presidential campaign was clearly biased against one candidacy (Pedro Castillo) over another (Keiko Fujimori). *H.1.*
- The *framing* strategies used by the media favored strategic approaches over thematic ones, as well as conflicting and economic framing during the development of the second round of the electoral campaign. *H.2.*
- The discursive strategies used by the media were clearly negative and biased against one candidacy (Pedro Castillo) over another (Keiko Fujimori). *H.3.*

In order to contrast the hypotheses raised, this paper uses a methodology of quantitative analysis, because a database was developed with all the news about the second round of the 2021 presidential elections in the main national

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media that would have been disseminated by these media actors through the social network Twitter (currently X). The selection of the media was made following the criterion of greater traffic on the web in Peru; it is also necessary to mention that the media object of the sample are the main disseminators of political information, having a recognized prestige among the citizenry, since its specialty lies in the social and political coverage of the country.

The media that were the object of the sample are the following:

- El Comercio (@el comercio_peru)
- The Republic (@larepublica_pe)
- RPP Group (@RPPNoticias)
- Management (@Gestionpe)
- Mail (@diariocorreo)
- Peru 21 (@peru21noticias)

The database included all the news reports published between April 15 (three days after the first round of voting) and June 5, 2021 (completion of the second round of the electoral campaign in Peru) that had referred to the second round of voting and whose objective would have been to address the candidates' strategies, their proposals, the incidents and institutional speeches, among other aspects. The second selection criterion used for its inclusion in the database was that the news had been spread by the official Twitter account (currently X) of the media outlet. This criterion was taken into account for determining the units of analysis since it was considered that the news disseminated by this social network were those that the media object of study considered relevant to disseminate, initially granting them a greater interest (priority) over the rest of the publications. This social network was chosen because of the importance they have acquired in the country and because it is the one where information is constantly dynamized. The algorithms that Twitter has available to users were used to locate the tweets within the time frame of the investigation.

The exhibition privileged the journalistic notes elaborated by the media in the treatment of the second round of the electoral campaign, both in the format of news, interview or opinion. Notes that only sent graphic information such as videos and photographs (photo reports) were not considered, but only those that had text. The repetition of the news by each of the media outlets was ruled out, since it is common for a news story to be spread through Twitter more than once.

Once all the selection criteria were applied, the database for this research was built, which has 472 news items (N=472) from the six media sources for analysis. Each of these news items (units of analysis) was coded taking into account the variables presented in table 1, which also briefly specifies what it sought to measure and what were the values that each of them could assume.

Table 1
Variables and sample description

Variables	Description
Media coverage	The focus of the note: Pedro Castillo/Keiko Fujimori/ Both candidates.
Type of column	The format of the prepared note: News/Interview/ Opinion.
Type of electoral *framing*	The *framing* that the academy considers to be used in electoral campaigns: Thematic/ Strategic.
Type of framing according to Semetko and Valkenburg (2000)	Conflict/Economic/Moral/Emotional.
Position regarding candidature	Position of the journalistic note regarding the candidacy (For-Against Castillo/For-Against Fujimori/Against both/ Neutral).
Content and speech analysis	Main topics covered in media coverage: Democracy and leadership/terrorism and violence/Economic approach/ General statements and/proposals.

The variables and their categories were elaborated following the main types of *framing* used by the academy either in the framework of an electoral contest (strategic and thematic), as well as in the general analysis of messages and discourses (conflictive, economic, moral and emotional) (Goffman, 2006). In addition, a brief description of each of the variables used in the construction of the database is presented below:

- As a reference to media coverage, we have considered that the selected news focus on the statements of the candidates, their technical teams, political allies or any other actor whose statements are intended to analyze and comment on the participation of either or both candidates.
- Regarding the type of column, the sample has selected the format of news, opinion and interviews. It is worth mentioning that most of

the information collected in the sample is based on news, with very little presence in opinion columns and interviews. This is because Twitter favors an agile and direct information content like most social networks.

- In relation to the position with respect to a candidate, the selected news was reviewed and, based on its content and approach, the negative or positive position with respect to a candidate, its proposals, alliances, statements and actions was determined. This variable considers three groups: i) Neutral, when the journalistic note complies with reporting objectively and without issuing any value judgment in its content (title, subtitle and note), being considered a kind of report, ii) Against a candidacy, when the focus of the news is intended to criticize a candidacy, either through an interview, opinion column or a news story and iii) In favor of a candidacy, when the meaning of the news highlights positive aspects of this.

- Finally, around the discourse and content of the topics warned in the selected news set, we present table 2 that gives lights on the definition of each of the selected topics:

Table 2

Topics and speeches in the news

Topic addressed	Definition
Political alliances	News that refer to the construction of support networks for a candidacy: between parties, members of technical teams, opinion leaders.
Statements in general	News covering candidate statements on debates, campaign strategies.
Democracy and leadership	News that refer to the behavior and democratic leadership of the candidates around the maintenance of the rule of law.
Economic approach	News that analyze the economic approaches of the candidates in their government programs.
Proposals in general	News that analyze proposals established in government plans in various areas: health, education, corruption, etc.
Terrorism and violence	News with an impact on violent events by candidates and their supporters, as well as the maintenance of networks with people linked to violent acts.

For the purpose of visualizing the configuration of the data matrix in terms of the number of news items corresponding to each media outlet, as well as the type of news item analyzed, table 3 shows the information on the number of observation units included by each media outlet and their percentage over the total of the 472 that make up the base.

Table 3

Number and percentage of each media object of the sample

Media		Number of news items	Percentage of sample
	Correo	95	20 %
	El Comercio	60	13 %
	Gestión	103	22 %
	La República	37	8 %
	Perú 21	81	17 %
	RPP	96	20 %
	TOTAL	472	100 %

Results

4.1. Media coverage

As a result of the review and analysis of the data contained in the matrix prepared for this research, a first result, in terms of media coverage, allows to observe that the candidacy of Pedro Castillo represented 54% of the information published by the national press, while 39% corresponded to Keiko Fujimori, and 7% focused on both candidacies (figure 1).

Figure 1
Media coverage
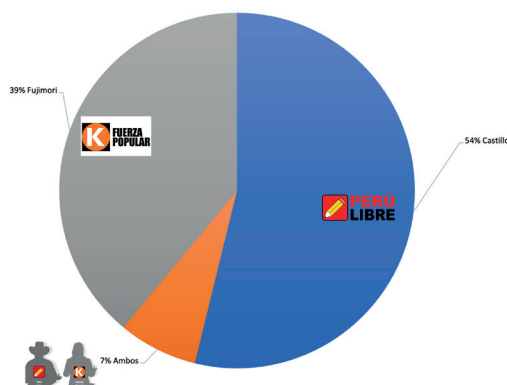
As for this variable, it is possible to say that the greatest attention of the media in the second round of elections was directed towards Castillo, who was called the outsider because he was not among the main and favorite candidates to win the presidential elections, who was running a regional political party. The media treatment of his candidacy was mostly negative, since 39% of the analyzed notes included information oriented against him, compared to a small 4% that did it against Keiko Fujimori. Although 44 % of the sample examined had a neutral tone in the treatment of the information, the informative difference in relation to the treatment provided to both candidates is notable (Figure 2).

However, considering the analysis in each of the media, we observe that the difference in the treatment of information in terms of coverage and positioning with respect to some of the candidatures is more evident in some of these. Thus, we appreciate that Gestión (103 news), RPP (96 news) and El Comercio (60 news), are the media that had the most coverage towards Castillo, which was mostly negative. These outlets show the same results, i.e., even though most of their coverage was neutral in nature, there is a big difference in the tone of the news treatment when attention is paid to the position assumed regarding one of the two contested candidacies.

Figure 2
Position on candidature

	In favor of Castillo	In favor of Fujimori	Againts both	Againts Castillo	Againts Fujimori	Neutral
▪Total	3,4 %	6,6 %	2,5 %	38,6 %	4,4 %	44,5 %
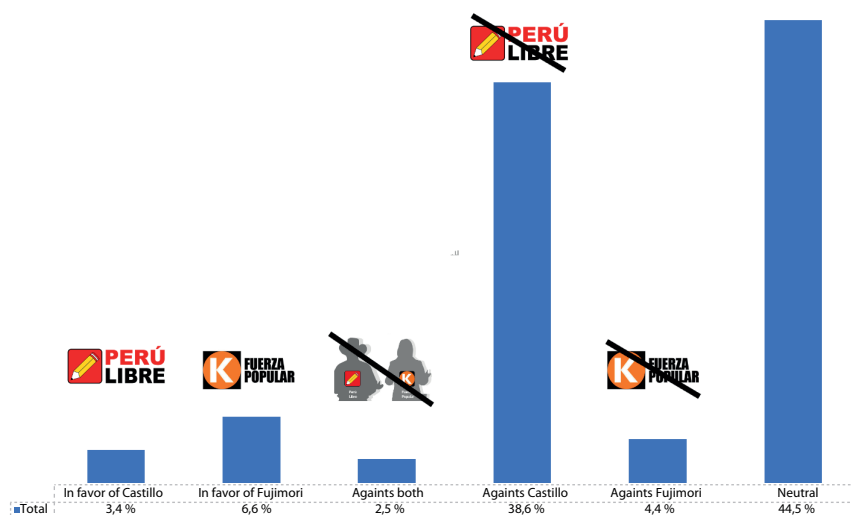
On the other hand, Correo (95 news items), is the only media outlet that has media coverage that focuses on Fujimori over Castillo. However, like Gestión, RPP and El Comercio, the coverage on Castillo was mostly negative, being that in this case its coverage against Fujimori was zero (32.6% against Castillo versus 0% for Fujimori).

A very interesting case is Peru 21 (81 news items), whose media coverage, although similar to the previous ones, with respect to which the majority focused on Castillo, presents as the only media that assumed a clear opposite position with respect to a candidacy over the neutral treatment of information. Thus, of all the news disseminated by this media, most present a position contrary to Castillo, this media outlet being the one that presents the greatest divergence in the information treatment with respect to the position around both candidacies.

From what has been discussed so far, concentrating only on the positioning against the candidacies, we warn that all the media outlets mentioned above had negative coverage about Castillo over Fujimori, drawing attention to the cases of Gestión, Perú 21 and Correo, whose news against Fujimori ranges from 0% to 1.2% of their coverage.

Finally, La República (37 news items) which, although like the other media focuses mostly on Castillo, in relation to the position he adopts in front of each candidate, is the only media that shows a contrary position on Fujimori. It also showed a low neutral position which is explained by the *fact-checking* function it performed during the campaign.

In summary, the findings found by means of communication show that the media coverage of most of the media (with the exception of Correo) focused on Castillo (figure 3).

Figure 3
Media coverage

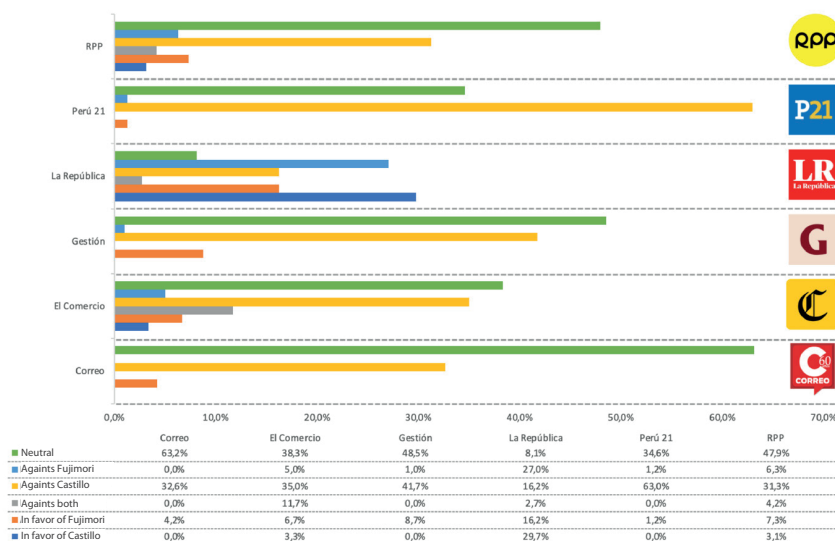|	Correo	El Comercio	Gestión	La República	Perú 21	RPP
■ Castillo	44,2%	41,7%	64,1%	51,4%	59,3%	56,3%
■ Castillo/Fujimori	1,1%	33,3%	1,9%	2,7%	1,2%	9,4%
■ Fujimori	54,7%	25,0%	34,0%	45,9%	39,5%	34,4%
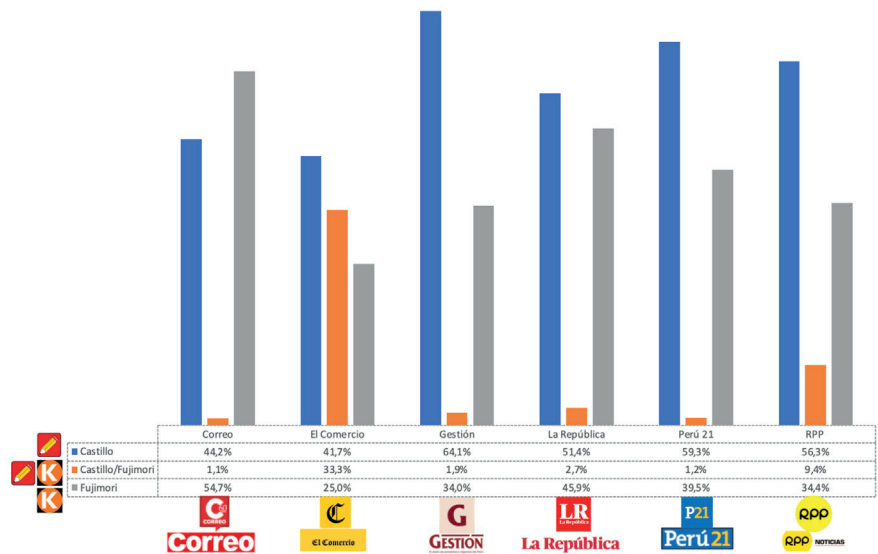
As for the detail of each of the media and their orientation in the variable "candidacy position", it is evident that most of the media, excepting La República, had a position against Castillo's candidacy (figure 4).

Figure 4

Position of media outlets with respect to candidacy

	Correo	El Comercio	Gestión	La República	Perú 21	RPP
Neutral	63,2%	38,3%	48,5%	8,1%	34,6%	47,9%
Againts Fujimori	0,0%	5,0%	1,0%	27,0%	1,2%	6,3%
Againts Castillo	32,6%	35,0%	41,7%	16,2%	63,0%	31,3%
Againts both	0,0%	11,7%	0,0%	2,7%	0,0%	4,2%
In favor of Fujimori	4,2%	6,7%	8,7%	16,2%	1,2%	7,3%
In favor of Castillo	0,0%	3,3%	0,0%	29,7%	0,0%	3,1%

As for the presented finding and taking up the results of the public opinion study carried out at the end of the elections and to which we refer in the introduction (study conducted by the Institute of Peruvian Studies in June 2021), it is seen that 79% of the population considered that most of the media supported one candidacy (Fujimori) over another (Castillo). However, the same survey was carried out during the second round of elections, and 59% of respondents considered that there was an inequitable treatment of the elections and that, within this population, 79% considered that they were favoring Fujimori's candidacy. In this sense, we observe that during the second round of the electoral campaign and after its completion, the citizen perception perceived an unequal treatment of information with respect to both candidacies.

In summary, these findings meet the specific objective 01 of this research, establishing that although media coverage mostly focused on one candidacy (Castillo) over another (Fujimori), most of the news presented neutral coverage, which partially confirms hypothesis 1 established in the methodological design, since it can be stated that, considering only the positioning
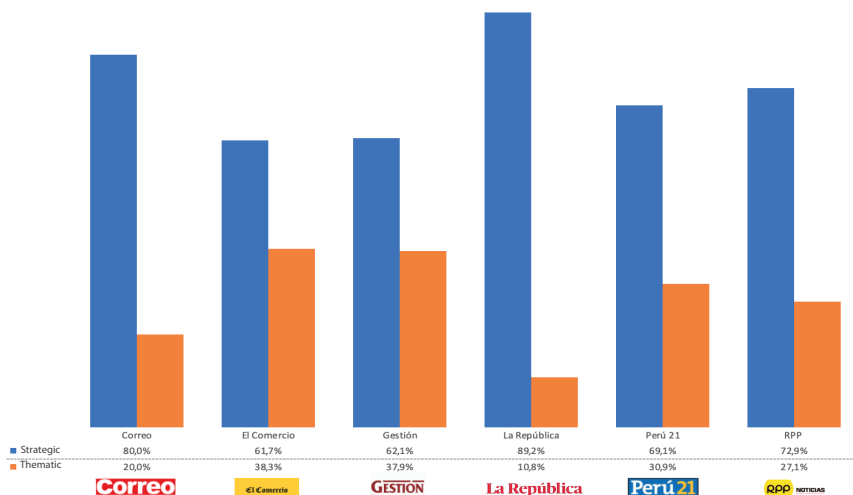
of media actors against the candidacies without taking into account neutral treatment, there was a greater negative coverage of one candidacy (Castillo) over another (Fujimori).

4.2 *Framing* strategies

However, regarding the *framing* strategies used by the main media, the analyzes of this work show clear results: 71% of the coverage was strategic, i.e., it was framed in the strategies and actions of the candidates above their electoral proposals, and only 29% focused on the dissemination and analysis of the proposals. Around each media object of sample, La República and Correo are the newspapers that used the most strategic *frame*. However, the differences between the other media are not significant, as they all used strategic *frames* above the thematic ones (Figure 5).

Figure 5
Electoral framing strategies through communication

|	Correo	El Comercio	Gestión	La República	Perú 21	RPP
Strategic	80,0%	61,7%	62,1%	89,2%	69,1%	72,9%
Thematic	20,0%	38,3%	37,9%	10,8%	30,9%	27,1%

The use of strategic *frames* above the thematic ones is a recurrent point in electoral campaigns, being that the media privilege the actions of the candidates in campaign over the proposals that they present in their candidacies.

Regarding the use of this type of framing with respect to the position towards a candidacy, we observe (figure 6) that all the media, excepting La República, used them mostly to provide a neutral treatment and against Castillo's candidacy, being that both Correo, El Comercio and RPP assumed a neutral position followed by a contrary one towards Castillo in both framing, while Gestión privileged strategic framing against Castillo over the neutrals, which were predominant in the thematic *frame*. On the contrary, in the case of Peru 21, the use of both frames had a negative treatment around Castillo's candidacy over a neutral stance.

Figure 6

Strategic and thematic frameworks used by the media
in their positioning towards the second round of elections
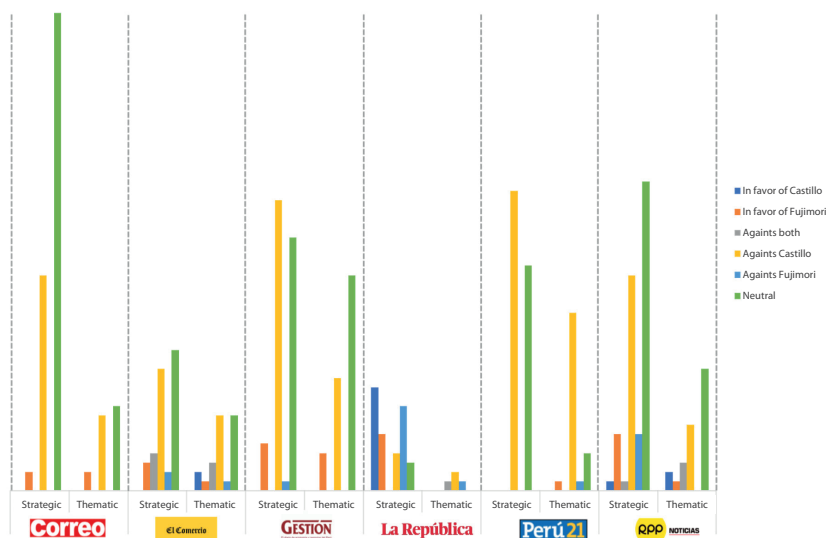
Analyzing how these two types of *frames* were used with respect to the subject of the news, we observe that this type of framing is presented differently depending on the media's approach (Figure 7). Thus, in the case of Peru 21, which was the outlet with a mostly negative coverage on Castillo, we observe that the strategic *frames* focused on news related to "terrorism and violence." As an example, the notes published under headlines such as

The Bishop of Pedro Castillo in the Puno region is from Movadef (04-06-2021); *Luis Alberto Sánchez: MRTA political arm participates in Castillo's campaign* (03-06-2021); *José Luis Gil: Intelligence informed authorities about the relationship between Movadef and Castillo* (30-05-2021), suggest a relationship between Castillo's candidacy and terrorism in Peru. On the other hand, RPP, La República, El Comercio and Correo, used this type of framing to address the different statements of the candidates throughout the campaign, referring to the debates and the incidents that had a presence in the day to day of the presidential campaign.

Figure 7

Strategic and thematic frameworks through communication and discursive content
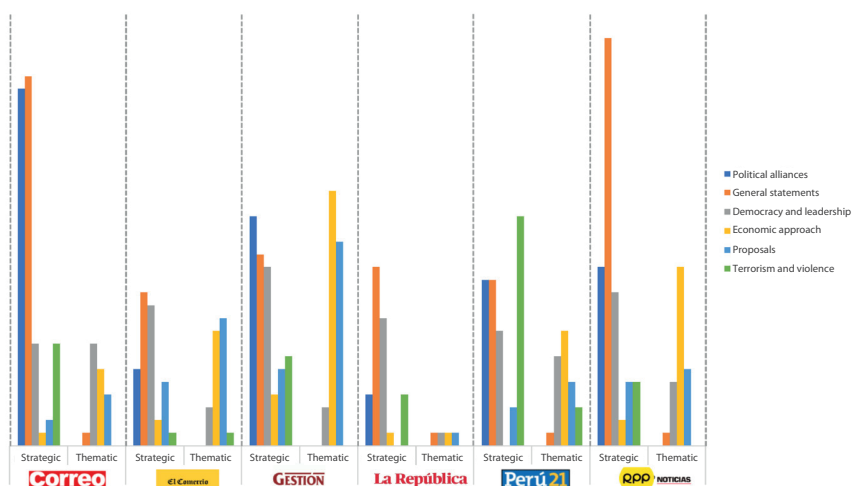
As for the thematic *frame*, an interesting finding is the case of Gestión that mostly affects the theme "economic approach", which is in line with the editorial line of the newspaper. This type of framing is used against Castillo, as can be seen from the notes published with headlines such as *New promises of Castillo confirm the improvisation and disorder of his campaign, according to analysts* (03-06-2021); *Luis Castilla: "A bank could not manage pension funds"* (30-05-2021); *Lima Stock Exchange closed with profits after a new survey showing the proximity between Fujimori and Castillo* (28-05-

2021). This type of journalistic notes are not presented in the case of Fujimori who, on the contrary, has positive thematic *frames* in this aspect, as is warned from the notes published by Correo under the headlines *Plan of government of Keiko Fujimori in foreign trade highlights promoting multilateralism* (22-04-2021); *Fujimori: "Our economic proposals are bold, but we have the financial backs to execute them"* (04-06-2021).

Regarding the *framing* strategies proposed by Semetko and Valkenburg (2000), the journalistic coverage preferred the conflictive framing (62%), being that the economic and moral frameworks were equal (16% each). Considering the results by means of communication (figure 8), we verify that the trends are met excepting La República where there is an advantage of moral *framing*, which can be explained in the *fact-cheking* work that it carried out during much of the coverage, corroborating and denying some messages that circulated on social networks, such as the headline dated May 2, 2021 which states that it turned out to be false that Peru Libre had agreed not to participate in the debates organized by the National Election Jury.

Figure 8

Types of framing according to Semekto and Valkenburg (2002) by means of communication

	Correo	El Comercio	Gestión	La República	Perú 21	RPP
Moral	9,5%	1,7%	11,7%	59,5%	22,2%	12,5%
Emotional	13,7%	5,0%	2,9%	0,0%	2,5%	10,4%
Economic	9,5%	20,0%	26,2%	2,7%	11,1%	18,8%
Controversial	67,4%	73,3%	59,2%	37,8%	64,2%	58,3%
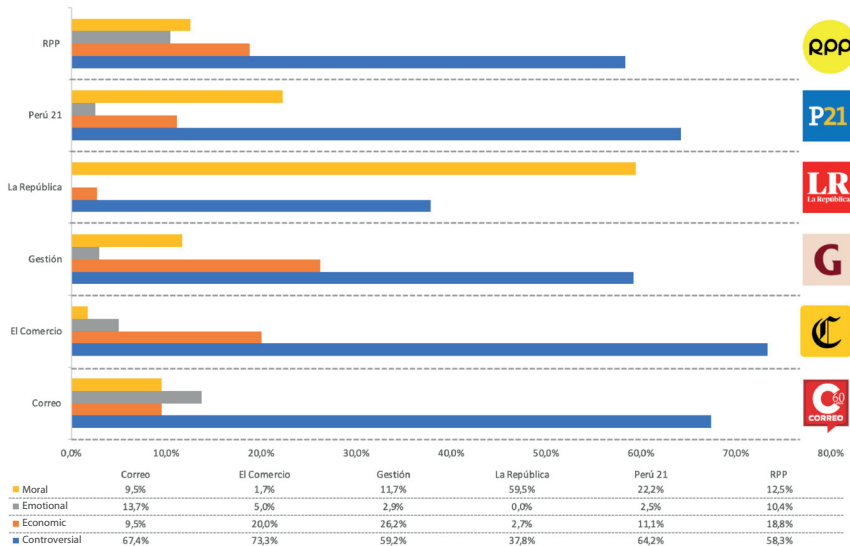
The other media privileged the conflictive framing, which was used, mostly for neutral and anti-Castillo coverage, being only the case of Peru 21 the outlet that privileged an anti-Castillo use over a neutral treatment under this type of framing (figure 9).

These findings present interesting results, since the strategies of strategic and conflictive framing coincide with scenarios of high political polarization, as is the case of the Peruvian presidential elections. Both the strategic and conflictive *frames* were predominant in each of the media that constitute the object of this study, being the substantial differences with respect to the other types of *frames* that has been detected, to which it is possible to achieve the specific objective 02 of this research with respect to the frames used by the media in the electoral contest, confirming also the hypothesis 2 established in the investigation, referring to the *frame* of electoral and conflictive type.

Figure 9

*Frames according to S and V by means of communication
in its positioning towards the second round of elections*
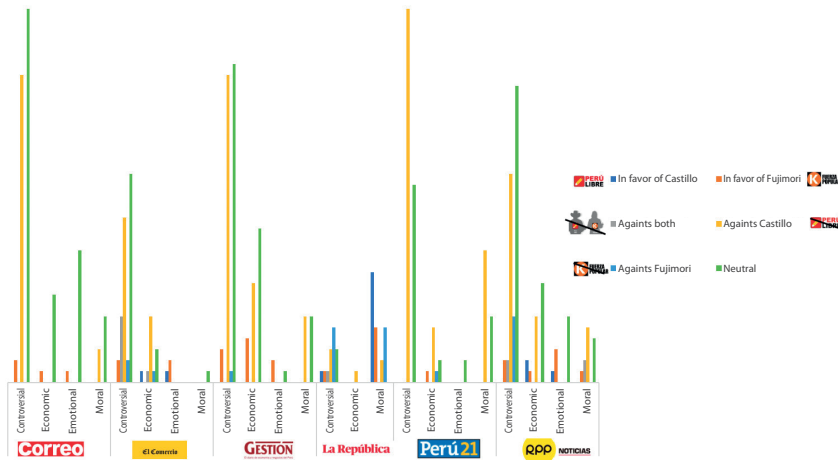
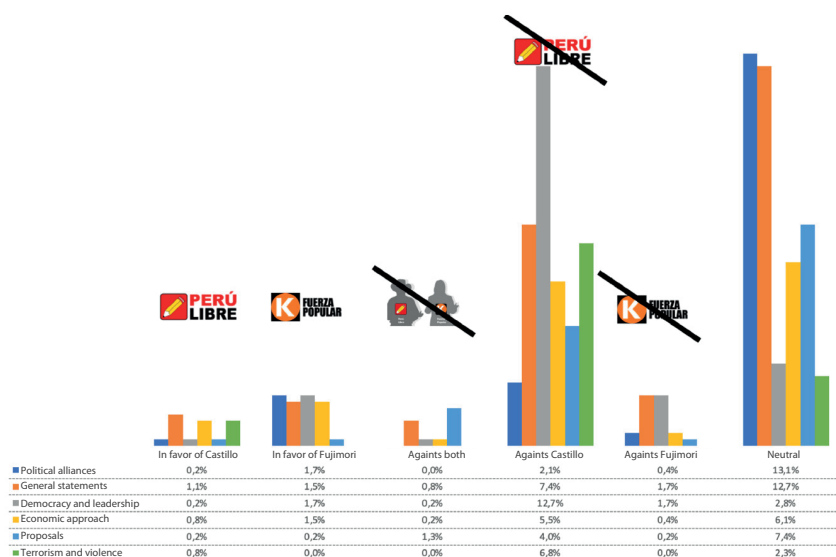## About the speeches and narratives spread in the campaign

In addition to inquiring about media coverage and the position towards the candidacies and the *framing* strategies used by the media, we are inter-

ested in addressing the content of the news spread by the main media around the second round of the electoral campaign. Thus, from the analysis and reduction of data from the 472 news items, we noticed the presence of six major topics that were treated and disseminated, which have been presented in the methodological section.

Analyzing the content with respect to the position of a candidacy (figure 10) we affirm that, although the trend in terms of the neutrality of coverage in general is met, it is evident the difference in treatment between the candidacy of Castillo and Fujimori. In fact, considering the news that spread a stance against Castillo, we observed that these focused on the theme "Democracy and leadership", followed by "Declarations in general", "Terrorism and violence", as well as criticisms of the "economic approach".

Figure 10

Content analysis of the news broadcasted

	In favor of Castillo	In favor of Fujimori	Againts both	Againts Castillo	Againts Fujimori	Neutral
Political alliances	0,2%	1,7%	0,0%	2,1%	0,4%	13,1%
General statements	1,1%	1,5%	0,8%	7,4%	1,7%	12,7%
Democracy and leadership	0,2%	1,7%	0,2%	12,7%	1,7%	2,8%
Economic approach	0,8%	1,5%	0,2%	5,5%	0,4%	6,1%
Proposals	0,2%	0,2%	1,3%	4,0%	0,2%	7,4%
Terrorism and violence	0,8%	0,0%	0,0%	6,8%	0,0%	2,3%

In this regard, the themes found are noteworthy, given that the informative content that encompasses them criticized Castillo's leadership, presenting him as a leader with few democratic credentials, close to populist and authoritarian measures and actions. Thus, it is evident that the informative

treatment provided highlighted its proximity to the Cuban model, to Chavismo, as well as to positions against the democratic institutionality of the country (Mendoza, 2022). Example of this are the headlines of Peru 21: María Werlau: "The evidence of Cuba's penetration in Peru is solid" [INTERVIEW] (02-07-2021); *Cerrón a la cubana: tracing and copying of a model that failed in Junín* (06-07-2021); *Correo: Vargas Llosa ratifies his support for Keiko Fujimori: "It is important that Peru does not fall into the catastrophe of Venezuela or* Cuba (24-04-2021); *Gestión: Vladimir Cerrón: "The left has to learn to stay in power and that is what Venezuela has done*" (21-04-2021) and *RPP: Pedro Castillo: Know the main economic proposals of the presidential candidate of Free Peru* (19-04-2021).

Similarly, the theme related to "violence and terrorism" was linked in a negative way to Castillo, spreading news that affected their relationship and proximity to insurgent people and ideologies, appealing to the negative memory of the internal armed conflict that affected the country. Thus, the headlines of Peru 21 are suggestive: José Baella: "There is a conspiracy between Movadef and MRTA" (04-06-2021); Shining Path invokes not to vote for Keiko Fujimori (11-05-2021); Movadef militants support Pedro Castillo in the Ancash region (12-05-2021); Post: Keiko Fujimori: "Pedro Castillo and his group are those who are accused of being linked to terrorism" (25-05-2021); ada to the MRTA joins Pedro Castillo (04-06-2021); *RPP: Keiko Fujimori: "Pedro Castillo and his group are accused of being linked to terrorism"* (25-05-2021) and *Management: VRAEM Self-Defense Committee: "It is absolutely false" that Castillo fought Sendero* (01-05-2021).

This representation of Castillo's candidacy motivated him to have been reluctant to present a large part of his technical team during the development of the campaign, due to the constant "terruqueo" to which their appearances and formulation of alliances were subject, which caused, even, negative headlines about this *position, as is the case of Peru 21, whose approach to the news was made under the following headline Pedro Castillo makes excuses and says that he will not expose his technical team* (06-05-2021).

Another important issue that was used against Castillo was that related to his "economic approach." Indeed, the information treatment appealed to the dangers that Castillo's economic proposal would cause to the detriment of national economic development, calling it a statist and communist that would limit the development of the free market, preventing the generation of wealth and resulting in a context of poverty and economic backwardness.

Headlines such as those of Peru 21: *Pedro Castillo's plan marks the route to poverty and unemployment* (30-05-2021); RPP: *More than 4 million Mypes reject Pedro Castillo's government plan* (01-05-2012), De Soto: "*I have met with Pedro Castillo to share my concerns about his government plan*" (28-04-2012), Diógenes Alva: "*We reject all these dictatorial measures*" by Pedro Castillo (26-04-2012); Management: *New promises of Castillo ratify the improvisation and the disorder of his campaign, according to analysts* (03-06-2021), Gonzalo Tamayo: "*Bolivian model for hydrocarbons sector would show its failure quickly*" (28-05-2021), WSJ Columnist: *If Castillo wins the bill will come later* (03-05-2021); The Republic: RMP on the government plan of Free Peru: "*It is a statist vision*" (16-04-2012); and El Comercio: *New government plan of Pedro Castillo: Tax proposals would be counterproductive, according to specialists* (17-02) - 2021), Proposal of Pedro Castillo: Veto to imports of rice, wheat and corn would double prices, according to specialists (28-05-2021), focused on the negative consequences that would occur of the victory of Castillo, undermining the economic growth that Peru has enjoyed since the new century due to the boom of extractive industries.

Contrary to what happened with Castillo, these issues had a minor impact on the news that addressed the approaches and actions of Keiko Fujimori. This finding presents polarizing discourses in the development of the candidacy, since while Castillo was identified as a leader with undemocratic characteristics, related to manifestations of violence and characters with an insurgent past, whose dangers to economic growth and development were latent, the discourse on Fujimori's candidacy did not, in general, have this type of connotation identifying it as a candidacy with more respect for democracy and against the manifestation of violent and insurgent acts, as well as the continuation of the economic model that brought benefits to the country. This aspect is striking, since Fujimori's candidacy is based on the social and political capital won during the 1990s by former President Alberto Fujimori Fujimori, whose regime dissolved the congress of the republic, seized various state institutions and had authoritarian and corrupt demonstrations (Degregori, 2014).

Focusing on the position of each media with respect to the thematic content (figure 11), although the coverage in general can be classified as neutral, we see that most of the media analyzed except for La República, had a negative coverage on Castillo, highlighting aspects such as violence and terrorism (Peru 21) and democracy and leadership (El Comercio, RPP, Correo

and Gestión). This can be explained by the ideological identification shown by each media outlet in its coverage. While La República is often identified as a left- and center-left media outlet, other media outlets are characterized by providing coverage by disseminating proposals from actors located on the right-wing political ideas. Also, taking into account the media group to which the media belong, El Comercio, Peru 21, Correo, La República and Gestión are part of the same group, in which El Comercio Group, as indicated in the introduction, is having a legal battle for purchasing the shares of the publishing house Epensa (Correo), which would give it a position of dominance in the media market. It should be noted that, although La República belongs to the El Comercio group, its position is a minority in the directory, which explains the differences between the information treatment between this media outlet and the others that belong to the aforementioned media group.

Figure 11

Content analysis by communication
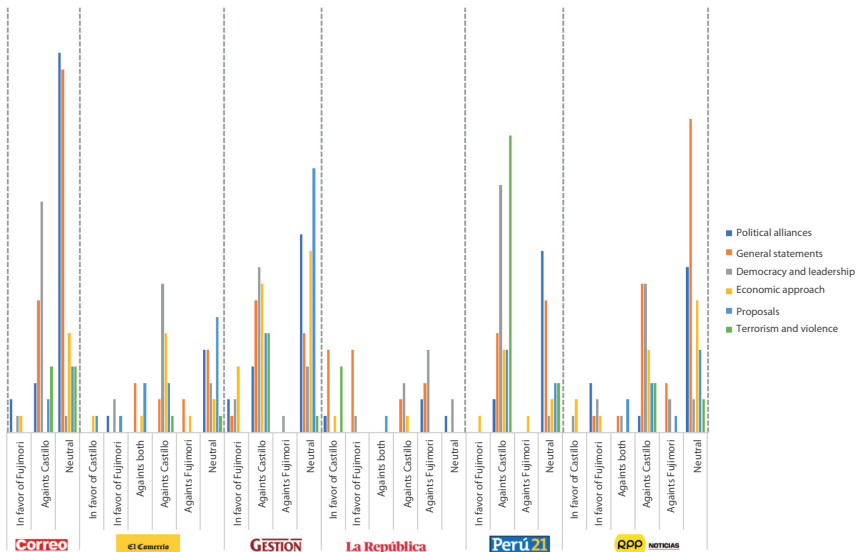
Also striking is the informative treatment provided within the media that share the same editorial line against Castillo within the El Comercio Group, since the media Peru 21, Correo y Gestión present a more aggressive coverage than the media that bears the name of the media group (El Comercio). This could be explained by the traditional and historical importance of El Comercio, which is known as the "Dean" of the national press.

The findings present a very interesting relationship with the results of the public opinion survey prepared by the Institute of Peruvian Studies during the electoral campaign (May III) regarding the citizen's perception of what each candidacy represented. Thus, when consulted about the reasons for voting Keiko Fujimori, it was obtained that 59% maintained as a basis the desire that the "left and communism do not come to power", being that when it was consulted about the reasons for voting Pedro Castillo, 47% claimed to want "the changes that the country needs".

These narratives have some overlap with the news content disseminated by the media during the second round. Although we cannot affirm a direct relationship, it is striking that the criticisms of Castillo related to his leadership, respect for democratic institutions, his links to terrorism and violence, as well as the economic approach of his program, are related to the reasons for the vote to Fujimori indicated in the poll analyzed, which encompasses the theme of "left and communism", narratives that take into account each of the thematic contents mentioned above. This is also reflected when in the same poll 30% of Castillo's anti-vote is related to his candidacy representing the "left and communism".

Given the findings found in this paper, it is essential to ask whether there is any consequence regarding the behavior of the media and the informative treatment provided in the development and results of the second round of elections. In this regard, we state that it is not possible to state this aspect forcefully; however, it is interesting to note that the perception of the public about the behavior of the media, as well as the representations disseminated through its informative treatment (Hall, 1997; Van Dijk, 2009), are somehow related with the reasons that founded the determination of the vote with respect to both candidacies. However, when describing the discursive strategies by the media, it has met the specific objective 02 of the investigation, as well as it confirmed hypothesis 3 referring to the media discursive strategy was clearly biased against Castillo unlike Fujimori.

Conclusions and discussion

The predominance of strategic frameworks on the issues in the development of electoral campaigns is confirmed in this work, being in agreement with most of the research found in this aspect (Muñiz, 2015; Berganza, 2008; Aalberg *et al.,* 2012; Coahila, 2019), confirming that the media emphasize the actions and statements of the candidates during the development of the electoral campaign over the thematic content of their proposals. Another interesting finding of this research is that although Castillo received a greater strategic framing during the electoral campaign, this did not prevent his electoral victory unlike what was established by Walter and Ophir (2020), for whom a greater strategic framing on a candidate is one of the factors that would determine the non-victory of his electoral proposal. Likewise, a conflicting framing by the media around the presentation of the news has been privileged, also typical of the scenario of political polarization that was experienced in the presidential elections.

This finding is very important, given that even though the coverage of the second round of elections was mostly neutral and that despite the differences in the information treatment around the candidacies of Castillo and Fujimori, there was a bias and negative coverage about the first; it is evident that despite the media effort of some media outlets to record negative representations in the information agenda against Castillo, these did not prevent his electoral victory. Although it should be noted that this was conceived with a very small difference despite the fact that, at the beginning of the second round, the distance between both candidates was 20% in favor of Castillo.

As for the discursive and narrative strategies during the second round of the Peruvian electoral campaign with respect to both competing candidates, this research concludes the existence of a disparate and biased treatment in favor of a candidacy, being represented by the political proposal of Keiko Fujimori (right) over that of Pedro Castillo (left), which agrees with the analyzes carried out by Acevedo (2018), García (2021) and Ruiz (2016), who through the study of electoral campaigns in Peru, denote the existence of a marked bias in the treatment of information, confirming that in the Peruvian case, the media, even when they point to report based on objectivity they have a determined political position with the candidates participating in the electoral contest. However, unlike what García (2021) and Ruiz (2016) mentioned, the results present El Comercio as a medium that, although it maintains a ne-

gative coverage on a candidacy (Castillo), the intensity is lower than other media that belong to the same media group (Correo, Perú 21 and Gestión), which could lead us to conclude the existence of a media strategy, where small newspapers with less trajectory are those that assume a much greater intensity against a certain candidacy.

These findings meet the general objective of the investigation, since it has been possible to determine what were the strategies of *framing* and discursive treatment used in the second round of the Peruvian electoral campaign establishing that, although there was a treatment that can be considered as neutral, there was a treatment of a differentiated character, privileging negative framing over one candidacy (Castillo) over another (Fujimori).

This difference in informative treatment between both candidates could influence the existing political polarization scenario, contrasting discourses and narratives that reflect opposite values, such as democracy vs. authoritarianism, violence and terrorism vs. social peace, economic development vs. poverty, etc. These opposing discourses represented by both candidates make the polarized scenario to be maintained, as established by various investigations (Nigro, 2021; Castromil and Chavero, 2012; Carratalá and Valera-Ordaz, 2019; Baldoni and Schuliaquer, 2019; Crespo and Melero, 2022). However, we cannot affirm the existence of a negative campaign by the media evaluated, since most of the selected news stories complied with providing neutral information about the electoral contest, being unable to share the conclusions with similar investigations (Pérez, 2013; Portillo, 2012; Sankey and Diaz, 2010).

However, as for the incidence or not of the informative treatment by the media in the development and electoral contest, as previously pointed out, even though there are public opinion studies that have measured citizen perception, for whom there was a partial treatment in favor of a candidacy, as well as the presence of speeches and representations as reasons for the foundation of the vote (Fujimori) and the anti-vote (Castillo) on the candidacies reflected in topics such as "democracy", "left", "terrorism" and "communism", this paper cannot conclude that there was indeed a causal and direct relationship. However, and given the presence of related topics such as those presented, the findings could serve as a basis for future research that measures the impact of the media strategy during the presidential elections in Peru.

The related context reflects that the second round of the presidential elections took place under a climate of political polarization as a result of

the generation of discourses and narratives that has generated wide margins of distrust and a logic of "friend-enemy" in current Peruvian politics. Even though Castillo's candidacy was victorious despite the media's position, it should be noted that his political position weakened throughout the electoral campaign. And even if it can be said that the positioning of the media agenda through the insertion of speeches and representation did not contribute to the electoral defeat of the candidate with the most negative coverage (Castillo), it is necessary to analyze and evaluate to what extent these representations contributed to the weakness of their political positioning, which may also be the subject of future research.

Given that we have been able to confirm the existence of a bias by most of the media in the informative treatment with respect to both candidacies, which is in line with Peruvian investigations that have addressed similar lines of investigation regarding previous presidential campaigns and taking into account the increasing presence of a media group (Grupo El Comercio), it is important to investigate what would be the direct effects that this position of current dominance produces in scenarios of political polarization (Gonzales, 2020), which are reflected not only in electoral contests, as well as what has been the role that this media group and the other aligned media outlets fulfill in this scenario.

In view of the aforementioned, we can appreciate that we are facing a fertile field of study, being that future researchers can use strategies that help measure the impact of the media strategy in electoral contexts, for which in addition to the construction of databases with news disseminated on social networks, it would be fundamental and important to know the position of the media, through the conduction of experiments through panels and surveys, as well as in-depth interviews with actors with decision-making power in the media.

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Call for papers
Sociology of Migration: Perspectives and Analysis

Issue 40 / March-August 2024

Coordinators

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The academic journal Universitas-XXI invites authors to send original articles that address migration from any of the multiple aspects committed in the broad impact of human mobility in host societies, transit and origin as well as in the migration corridors and territories of exclusion and expulsion. Migration poses significant political and ethical challenges, as well as theoretical and methodological challenges that should be discussed and shared in the journal. The contexts of vulnerability, exposure and loss of "human security" (political-economic crisis, armed conflicts, climate change, among others) have contributed to increase the forced displacement of groups of populations, and at the same time the appearance of multiple forms of violence and violation of rights in the complex, extensive and dramatic migratory processes observed in the exponential increase of death and disappearance in migration since the 1990s. Despite the above, it can also be considered that human mobility deploys a social force as a conscious and collective response to the challenges of survival, as well as resistance to processes of immobility or barriers/walls to migration.

Likewise, it is also interesting to analyze and understand anti-migrant trends motivated by racism, sexism, classism, xenophobia, among others, expressed in practices and speeches of hatred, violence, intolerance and discrimination. Additionally, it considers the review and analysis of actions, practices and strategies to confront and combat hate speech and promote the formation of intercultural societies of cultural, ethnic-racial and religious diversity.

The following axes are proposed:

- Spaces and forms of contemporary human mobility (movements, exiles, diasporas, refuge, wanderings, migrant caravans, walkers, etc.)
- Migration and border policies (control, security, sovereignty, regularization and irregularity, etc.)
- Conditions of human (in)mobility (inequality, violence, socio-political, socio-natural crises, etc.)
- Anti-migrant speeches and practices (xenophobia, racism, discrimination, hate speech, fear speech, etc.)
- Migrant and pro-migrant collective action (political, social and cultural actions and organizations; mobility practices; anti-colonial theory and practices, art and public presence, etc.)
- Human Mobility
- Diasporas
- Exiles
- Refugees
- Racism
- Xenophobia
- Migration policies.

Convocatoria del Dossier
Sociología de las migraciones
Perspectivas y análisis

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La revista académica Universitas-XXI invita a enviar artículos originales sobre trabajos que aborden el campo de las migraciones desde cualquiera de los múltiples aspectos comprometidos en el impacto amplio de la movilidad humana en las sociedades de acogida, de tránsito y de origen así como en los corredores migratorios y los territorios de exclusion, errancia y expulsión. El fenómeno migratorio plantea retos politicos y éticos considerables y para nuestras disciplinas desafíos teóricos y metodológicos que deseamos discutir y compartir en este número 40 de la revista. Los contextos de vulnerabilidad, exposición y pérdida de "seguridad humana" (crisis político-económicas, conflictos armados, cambio climático, entre otros) han contribuido a incrementar en las últimas décadas los desplazamientos forzados de conjuntos de poblaciones, y a la vez la aparición de múltiples formas de violencia y vulneración de derechos en los complejos, extensos y dramáticos procesos migratorios que observamos en el aumento exponencial de muerte y desaparición en migración desde los años 1990. Pese a lo anterior, cabe considerar también que la movilidad humana despliega una fuerza social como respuesta conciente y colectiva ante los desafíos de sobrevivencia, así como la resistencia ante procesos de inmovilidad o de barreras/muros a la migración.

También es de interés para este número el análisis y comprensión de las tendencias anti-migrantes motivadas por el racismo, sexismo, clasismo, xenofobia, entre otros, y expresadas en prácticas y discursos de odio, violencia, intolerancia y discriminación. Del mismo modo, se considera la revisión y análisis de las acciones, prácticas y estrategias para enfrentar y combatir los discursos de odio y favorecer la formacion de sociedades interculturales de diversidad cultural, étnico-racial y religiosa.

Se proponen los siguientes ejes:

- Espacios y formas de la movilidad humana contemporanea (circu-laciones, exilios, diasporas, refugio, errancias, caravanas migrantes, caminantes, etc.)
- Politicas migratorias y de frontera (control, seguridad, soberania, re-gularizacion e irregularizacion, etc.)
- Condiciones de la (in)movilidad humana (desigualdad, violencia, crisis socio-politicas, socio-naturales, etc.)
- Discursos y practicas antimigrantes (xenofobia, racismo, discrimi-nación, discurso de odio, discursos de miedo, etc.)
- Accion colectiva migrante y pro-migrante (acciones y organizacio-nes politicas, sociales y culturales; practicas de movilidad; teoria y practicas anti-coloniales, arte y presencia publica, etc.)
- Movilidad humana
- Diásporas
- Exilios
- Refugiados
- Racismo
- Xenofobia
- Políticas migratorias.