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SUMMARY

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Consejería de Sanidad, Presidencia y Emergencias
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Summary

DEBATE/DEBATE:
BEYOND BIG DATA: GENERATIVE AI AND LLMS AS NEW DIGITAL TECHNOLOGIES FOR ANALYSING SOCIAL REALITY/
MÁS ALLÁ DEL *BIG DATA*: IA GENERATIVA Y LLMS COMO NUEVAS TECNOLOGÍAS DIGITALES PARA EL ANÁLISIS DE LA REALIDAD SOCIAL

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Information on CENTRA's scientific publications in social sciences

The **Andalusian Studies Center Public Foundation** -CENTRA-, attached to the Consejería de la Presidencia, Interior, Diálogo Social y Simplificación Administrativa of the Junta de Andalucía, is a scientific and cultural institution that already has a history of more than twenty years, and which has as its foundational objectives the promotion of scientific research and the generation of knowledge about the social, economic and cultural reality of Andalusia.

In accordance with these purposes and its nature, **CENTRA** has created ex novo in 2021 a line of scientific publications in the field of social sciences, in accordance with the universalist canons of scientific communication, made up of three book collections (Actualidad, Biblioteca de Investigación y Enfoques) and the CENTRA Journal of Social Sciences.

The **ACTUALIDAD** collection addresses issues of relevance and interest in the contemporary Andalusian social and political reality linked to the broader context of Spanish society, the European Union and, in short, global dynamics. It is characterized by a determined orientation to present empirical evidence of the phenomena considered, linking the data provided to its theoretical and explanatory analysis.

Even though it is a collection linked to the scientific community and research in the social sciences, it is also conceived under the broadest idea of dissemination for an audience that is not an expert in the topics covered. The collection, which has been published without interruption since 2005, is now structured according to a selection process for original manuscripts in accordance with universalist criteria of scientific quality and anonymous evaluation by academic peers external to CENTRA. It is available in digital format and is accessible by free download from the website of the Center for Andalusian Studies.

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In order to provide content to all this new initiative of scientific publications, and scrupulously guarantee the principles of scientific communication, there is an interdisciplinary Editorial Board made up of prestigious professors from universities and national and international research organizations.

ARTICLES
ARTÍCULOS

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ARTICLE/ARTÍCULO

Advancing the SDGs through Fiscal Strategies for a Circular Economy: Climate Neutrality and Responsible Production and Consumption

La consecución de los ODS mediante estrategias fiscales de economía circular: la neutralidad climática y la producción y consumo responsables

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ABSTRACT

This paper examines the close relationship between the Sustainable Development Goals and the circular economy (CE) model, highlighting how both approaches contribute to sustainable development across its economic, social and environmental dimensions. The CE aligns coherently with several SDGs, particularly in combating climate change and promoting responsible consumption and production. Within this relationship, fiscal and finance law plays a crucial role – taxation can become a powerful driver for achieving the SDGs, especially regarding environmental sustainability and social equity. Two of the most relevant strategies in the field of circular economy in Spain – climate neutrality and responsible consumption and production – serve as examples through which to analyse this relationship.

KEYWORDS: circular economy; sustainable development goals; taxation; climate neutrality; sustainable production; responsible consumption.

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RESUMEN

Este trabajo pretende poner de manifiesto la estrecha relación entre los Objetivos de Desarrollo Sostenible y el modelo de economía circular, destacando cómo ambos enfoques pueden contribuir al desarrollo sostenible en sus dimensiones económica, social y ambiental. La EC se alinea de manera coherente con varios ODS, particularmente en áreas como la lucha contra el cambio climático y la promoción de la producción y consumo responsables. En esta relación, el derecho financiero y tributario juega un papel crucial, y la fiscalidad puede convertirse en un potente motor para la consecución de los ODS, especialmente en lo que respecta a la sostenibilidad ambiental y la equidad social. Dos de las estrategias más relevantes en el ámbito de la economía circular en nuestro país, como la neutralidad climática y la producción y el consumo responsable, nos sirven de ejemplo para analizar esta relación.

PALABRAS CLAVE: economía circular; Objetivos de Desarrollo Sostenible; fiscalidad; neutralidad climática; producción sostenible; consumo responsable.

1. Introduction

The close relationship between the Sustainable Development Goals (SDGs) and the circular economy (CE) model contributes to sustainable development across its economic, social and environmental dimensions. The implementation of the CE not only facilitates the optimisation of resources but also responds to the urgent need to mitigate environmental impact and promote sustainable economic development. Through the reduction, reuse and recycling of resources, the CE aligns consistently with several SDGs, particularly in combating climate change and promoting responsible consumption and production.

Furthermore, financial and fiscal law has been identified as playing a crucial role in the transition towards a circular economy. Taxation – through incentive policies and appropriate fiscal measures – can become a powerful driver for achieving the SDGs, especially regarding environmental sustainability and social equity. Accordingly, it is essential that fiscal policies align with the objectives of the 2030 Agenda, contributing not only to ecological sustainability but also to the reduction of economic and social inequalities.

The intersection of these three elements – circular economy, taxation and the SDGs – presents an effective framework for incentivising the transition to the CE whilst advancing the fulfilment of some sustainable development goals, given the established linkages between them. With this understanding, this paper focuses on two principal strategies for transitioning to the CE – climate neutrality and responsible consumption and production – to analyse existing measures and propose improvements.

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1.1. SDGs and the CE: Two Agendas with Common Goals

Almost a decade has passed since the United Nations (UN) General Assembly approved the 2030 Agenda on Sustainable Development. It comprises 17 SDGs reflected in 169 targets, aimed at eradicating poverty whilst simultaneously advancing strategies that promote economic growth and address a series of social needs such as education, health, social protection and employment prospects, all whilst combating climate change and protecting the environment. In other words, the goals combine the three dimensions of sustainable development: economic, social and environmental.

The concept of CE to which we refer is that of a new environmental protection system – which uses resources more efficiently – in which the value of products and resources is maintained in the economy for as long as possible and waste generation is minimised. This concept emerges in contrast to the linear economic model (García Calvente, 2018; Soto Moya, 2019), bringing together different philosophies grounded in the recognition of this model's unsustainability and the need to find alternative solutions that make economic, social and environmental development compatible with one another (Rodríguez-Antón, 2019). Although a sufficiently consensual concept of the CE remains elusive, there is agreement on the need to move towards a model different from the prevailing axioms of production and consumption, and we believe that this transition should be governed by the value of justice.

The CE emerged when environmental concern was reconciled with the economistic approach through promotion of the 3Rs rule: reduce, reuse and recycle (*ibid.*). Subsequently, additional Rs have emerged in the same vein, each adding distinct nuances – repairing extends product lifespan, redesigning facilitates reuse and recycling, whilst rethinking transforms production processes to consume fewer resources and generate less waste.

The importance and recognition that the CE has achieved has been accompanied and boosted by actions carried out by public administrations and, equally, private institutions (*ibid.*). There is no doubt that the European Union is the main driver of CE in the international arena. The connection between the SDGs and CE begins in 2015, a key year for raising awareness and implementing the CE at EU level thanks to the Action Plan that introduced a package of reforms fundamentally affecting waste (Sedeño López, 2023). It was also the year in which the UN General Assembly approved the 2030 Agenda. The first Circular Economy Action Plan has been followed by a second in 2020 and the European Green Deal in 2019, which highlights the relevance of circular production and consumption patterns as a decisive factor in achieving the SDGs of the 2030 Agenda.

The CE therefore seeks to combine the optimal use of available resources with a transformation of the productive system, thereby supporting planetary sustainability alongside the economic development necessary to generate wealth

and employment. These goals are perfectly compatible with the SDGs. Although the CE has a much more specific and limited dimension than the SDGs, there exists a deep relationship between the two, allowing the implementation of a CE model to facilitate the achievement of some of these objectives. In this way, the CE is an economic model that drives the SDGs. Specifically, authors such as Rodríguez-Antón (2019) conclude, after detailed comparative analysis, that the implementation of the CE can accelerate progress on ten of the seventeen SDGs. Rationalising consumption of commodities in general – or natural resources such as water in particular – helps reduce hunger and poverty whilst directly impacting climate action and improving access to resources like electricity and water. Furthermore, reuse and recycling, two defining actions of the CE, help to achieve sustainability. In the following section, we examine how fiscal measures can serve as a link between the CE and the SDGs.

1.2. Financial and Fiscal Law as an Instrument of Social Transformation

The third pillar in this triangular relationship is finance, a key element both for achieving the SDGs and for promoting the implementation of the CE. A joint interpretation of the Spanish Constitution (SC) and Act 58/2003 of 17 December on General Taxation (LGT, from its Spanish initials) underscores the need to conceive the tax system not only in relation to the principle of economic capacity but also in connection with other constitutional objectives. The public policies adopted in application of the CE concept possess a strong incentive character, protected by safeguards provided in the SC: Article 45 urges public authorities to protect and improve quality of life, as well as to defend and restore the environment, whilst Article 11 of the Treaty on the Functioning of the European Union (TFEU) integrates environmental protection and the promotion of sustainable development into EU policies and actions. Furthermore, guiding principles such as social and economic progress, equitable income distribution and full employment (Article 40 of the SC) and the modernisation and development of economic sectors (Article 130 of the SC) underpin the case for a CE. The LGT itself establishes in its Article 2.1 the non-fiscal function of taxes.

In the 2030 Agenda we find various statements concerning the importance of taxation as one of the principal means of achieving efficient, sustainable and socially equitable economies. Tax rules can be deployed as incentive measures for certain types of actions, such as those related to the CE (Soto Moya, 2019). Although the concept of CE may appear, *a priori*, to be exclusively associated with the environmental dimension of sustainable development, it also contributes to social and economic development and can therefore help reduce economic inequalities.

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2. Achieving the SDGs through Circular Economy Fiscal Strategies

As societies embark on the critical phase of transitioning towards the CE, strategically designed public policies can serve as catalysts for achieving the SDGs. This premise underpins numerous fiscal measures that simultaneously advance the CE whilst facilitating SDG fulfilment. To illustrate this relationship, we examine two pivotal CE strategies – climate neutrality and responsible consumption and production – both characterised by extensive legislative measures which have proved to be of varying effectiveness.

2.1. Decarbonisation and Climate Neutrality

This first strategy centres on reducing CO_2 emissions and slowing down climate change, whilst also directly supporting SDGs 7 (affordable and clean energy), 13 (climate action) and 15 (life on land).

Given that the circular economic model is inherently low-carbon, fiscal measures targeting emission reductions naturally advance environment-related SDGs. To this end, it is essential to recognise that greenhouse gases are the primary driver of global warming, with CO_2 alone being responsible for approximately three-quarters of total emissions. These emissions stem primarily from combusting energy products and incinerating solid waste, thereby positioning decarbonisation as the cornerstone of energy transition. As Calviño (2024) observes, sectoral measures are spearheaded by an energy revolution characterised by:

> [...] economic growth is rapidly decoupling from carbon dioxide emissions, owing to advances and innovation in clean energy generation and efficiency technologies that combat climate change whilst fostering competition.

2.1.1. Energy Taxation

The European Green Deal, closely aligned with SDG achievement, constitutes an action plan to promote efficient resource use through transitioning to a clean, circular economy, restoring biodiversity and reducing pollution – with the ultimate aim of rendering Europe the first climate-neutral continent by 2050. To meet the decarbonisation goals established in the Paris Agreement, an intermediate target has been proposed: reducing greenhouse gas emissions by 55% relative to 1990 levels by 2030. This "Fit for 55" package encompasses various measures, including a proposed revision of the Energy Taxation Directive, which we examine below.

The EU seeks to discourage consumption of the most polluting energy products through a process termed energy transition. We concur with López Rodríguez (2024) that, in this transition, the taxation of energy products and electricity – harmonised at Community level – is positioned to play a pivotal future role. However, any Europe-wide initiative must contribute to preserving and strengthening the internal market. Moreover, environmental taxation, whilst guided by the "polluter pays" principle, risks diverging from the principle of economic capacity, potentially imposing disproportionate burdens on vulnerable taxpayers.

To ensure energy products are taxed according to their environmental performance, a proposal to revise the Energy Taxation Directive was adopted on 14 July 2021 as part of "Fit for 55". This proposal principally aims to align energy product taxation with EU energy and climate policies, promoting clean technologies whilst eliminating exemptions and reduced rates that currently incentivise fossil fuel consumption. The proposed reforms centre on restructuring rate frameworks and expanding tax bases, alongside eliminating many existing exemptions and reductions (Bertrán Girón, 2024).

Regarding rate structure, the proposal shifts the basis for taxation from volume to the actual energy content and environmental performance of fuels and electricity. Minimum rates derive from energy content, incentivising more efficient and environmentally sound decisions, as the new system ensures higher taxation of the most polluting fuels. This would enable businesses and consumers to make cleaner, more climate-friendly choices. For instance, electricity from renewable sources would benefit from highly favourable treatment, given its non-polluting nature, low cost and absence of consumables required for generation. However, renewable electricity faces limitations in storage capacity and management complexity, as generation depends on external factors such as solar irradiation and wind conditions. Green hydrogen represents another significant energy product, as its production and consumption are climate-neutral and generate no polluting emissions. Unlike other renewable sources, hydrogen possesses storage capacity – either as pressurised gas or in liquid form. Taxation should therefore promote its consumption, alongside that of renewable electricity and advanced sustainable biofuels (López Rodríguez, 2024).

The proposal further provides for the gradual elimination of certain product exemptions and reductions. Additionally, the classification of products for tax purposes would be simplified, ensuring that environmentally harmful fuels bear the highest tax burden. Aviation kerosene and marine fuel oil for intra-Community transport will be taxed for the first time; following a transitional period, these fuels would no longer remain entirely exempt from energy taxation. This levying of taxes on such fuels reinforces the intention to promote more sustainable practices across these sectors.

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As López Rodríguez (2024) demonstrates, this reform must be implemented whilst preserving Member States' revenue-generating capacity. Energy product taxation must minimise adverse impacts on the competitiveness of strategic economic sectors whilst simultaneously preventing the relocation of industry to other jurisdictions with more permissive CO_2 emissions regulations. Crucially, the proposal requires unanimous EU Council approval for adoption.

For the energy transition to succeed, however, it must be both swift and equitable, protecting resource-constrained households who face heightened vulnerability to global warming dangers and the distributional impacts of green transition policies, particularly as emerging technologies disrupt traditional industries and established business models.

2.1.2. Sustainable Transport

The transport sector represents both a cornerstone of necessary energy policy transformation and an engine of economic growth, requiring the integration of technological development with ecological transition criteria aligned with Europe's climate neutrality targets for 2050. Regarding road mobility, the 2030 Agenda mandates, in accordance with the Paris climate goals, emissions reductions of 45% by 2040 and 85% by 2050. This necessitates a transition towards clean and sustainable mobility through the adoption of electric vehicles powered by cleaner energy sources (Patón García, 2024). The EU framework[1] calls for a 55% reduction in emissions by 2030, whilst the European Parliament established in February 2023 a target of zero CO_2 emissions for new passenger cars and vans by 2035 as part of its "Fit for 55" package.[2]

Achieving this objective requires financial and fiscal measures encompassing direct financing to the electric vehicle industry, consumer subsidies for vehicle acquisition and tax incentives for their purchase. These measures can be complemented by public investment in charging infrastructure, subsidies for domestic chargers, electric public transport, public procurement of electric vehicles and indirect consumer incentives, such as preferential bus lane access, free or preferential parking, low-emission zone access, complimentary public charging and toll exemptions (*ibid.*).

Focusing on the environmental dimension of vehicle taxation, incentive mechanisms require revision across two distinct areas: vehicle acquisition and use.

In 2023 and 2024, within the Strategic Projects for Economic Recovery and Transformation (PERTE)[3] framework, connected electric vehicles (CEVs) have led sectoral transformation. Among the numerous points of action is the incentive plan for charging point installation, electric and fuel cell vehicle acquisition, and innovation in electromobility, recharging and green hydrogen (MOVES III), recently extended to 2025.[4]

This plan, approved by Royal Decree-Law 5/2023 of 28 June, includes Personal Income Tax (IRPF, from its Spanish initials) deductions for CEV acquisition and charging point installation. However, the deduction's legal regime[5] incorporates specific requirements and conditions that restrict its application. Regarding material scope, only new "plug-in" electric and fuel cell vehicles registered before 31 December 2025 qualify for the deduction, with sale prices not exceeding the maximum amounts established for each vehicle type in Annex III of Royal Decree 266/2021 of 13 April, calculated in the manner set out in said decree.

The deduction excludes vehicles used for economic activities; thus, vehicles intended for business purposes – whether by the acquirer or third parties – cannot qualify, regardless of ownership structure. The deduction can be used for only one vehicle per taxpayer, as specified in the sales contract. The maximum deduction base stands at €20,000 per vehicle, reduced by any public aid received for its acquisition. Applying 15% to amounts paid during the tax period for vehicle acquisition yields a maximum deduction of €3,000. The deduction can be applied in two different ways: either during the tax period when the vehicle is registered (before end-2025) or, for instalment purchases, when at least 25% of the price has been paid.

This measure is accompanied by a deduction for charging infrastructure installation representing 15% of amounts paid (excluding cash payments) between 30 June 2023 and 31 December 2025, with a maximum base of €4,000. The deduction applies in the tax period when installation is completed. This aid is complemented by local tax subsidies introduced in Royal Decree-Law 29/2021 of 21 December, adopting urgent measures in the energy field to promote electric mobility, self-consumption and the development of renewable energies.

This deduction functions as a powerful tool for incentivising behavioural change and widespread electric vehicle adoption. However, it must be accompanied by well-targeted fiscal and financial policies promoting more efficient and sustainable mobility.

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Sustainable mobility implementation remains contentious, as electric vehicles possess limitations that require further technological innovation – notably their range and battery technology. Consequently, electric vehicles require extensive public charging networks or, alternatively, the widespread development of domestic charging facilities. The Real Estate Tax credit for recharging infrastructure installation, which is applied by local entities, should enhance and accelerate development imminently (Patón García, 2024).

Regarding vehicle use measures, there are two principal taxes that may function as environmental policy instruments against climate change. The Hydrocarbon Tax can increase rates and eliminate the distortions created by its current configuration. However, such tax measures aligned with environmental objectives must consider potential joint effects on competitiveness and employment whilst weighing the proportionality of measures adopted for environmental protection, avoiding unwanted tax competition effects. Current economic conditions may not favour fuel tax increases; therefore, revising the configuration of taxation on vehicle acquisition and possession could yield short-term impact.

Within registration taxes – the Special Tax on Certain Means of Transport (IEDMT, from its Spanish initials) – and circulation taxes – the Motor Vehicle Tax (IVTM, from its Spanish initials) – elements based on potential emissions of each vehicle type have been introduced.

The IEDMT originated from revenue needs and the effects of automobile use on infrastructure and the environment. Specifically, Act 34/2007 of 15 November on Air Quality and Atmospheric Protection adjusted tax rates according to the CO_2 emissions of each taxed means of transport. This tax applies at vehicle purchase, with taxable amounts calculated based on sale price. Autonomous communities may increase the state-wide minimum rate, though this regulatory power has been rarely exercised. Four tax brackets apply to high emission levels (above 120 g CO_2/km), whilst energy-efficient vehicles benefit from a 0% rate. Currently, the IEDMT lacks tax discrimination between hybrid vehicles and pure electric vehicles – an aspect requiring correction to favour the acquisition of zero-emission vehicles. Combining direct aid to zero- and low-emission vehicles with a bonus–malus scheme in the IEDMT for progressive penalties on vehicles emitting up to 120 g CO_2 may prove beneficial (Patón García, 2024).

The local tax system has undergone notable evolution. Originally, the IVTM and public transport taxes were designed purely as revenue-raising instruments based on economic capacity – measured by vehicle ownership or service consumption – without any consideration of environmental sustainability. However, this has changed as tax measures have been increasingly linked to environmental protection, with local tax regulations now incorporating sustainability objectives.

Currently, the IVTM is based on fiscal power, which considers engine cylinder number and cycle time. In most municipalities, the highest tax brackets apply to the most polluting cars, whilst battery electric vehicles (BEVs) and plug-in hybrid electric vehicles (PHEVs) receive advantageous taxation. Additional provisions linking tax rates to CO_2 emissions (García de Pablos, 2023) or noise pollution levels would prove beneficial. For instance, municipalities could apply progressive multipliers ranging from 1 to 3 during the first three years, as proposed by ECODES and T&E (2019).

The IVTM includes two possible bonuses: (a) up to 75% based on fuel class consumed by the vehicle, reflecting the impact its combustion has on the environment; and (b) up to 75% based on engine characteristics and environmental impact. The first bonus typically applies to vehicles using alternative fuels (gas, biogas, methanol, hydrogen, etc.), possessing more specific and clearly environmental content with little discretion in its application. The second bonus applies to vehicles with special engine characteristics (electric, hybrid, solar energy, etc.).

Spain's sustainable mobility strategy is defined by the European objective of achieving substantial electromobility levels by 2035. The *White Paper on Tax Reform* (2022) argues that transport electrification and advanced biofuel use constitute vectors of ecological transition policy, accompanied by objectives including a reduction in the use of private vehicles, the delimitation of low-emission zones in major cities and the expansion of renewable energy use. We concur with Patón García (2024) that the current situation necessitates a comprehensive review of taxation affecting different vehicle-related aspects, with particular attention to environmental impact.

2.2. New Modes of Production and Responsible Consumption

With global population projections for 2050, nearly three planets would be required to provide the natural resources necessary to sustain current lifestyles (World Bank, 2016). The CE strategy to be adopted in this field must extend beyond waste and recycling, focusing on design and production to promote new consumption models that prioritise service-based access over ownership, reinforce consumer guarantees against planned obsolescence, enhance product repairability and eliminate food waste.

Therefore, in accordance with the European Circular Economy Action Plans and the 2030 Agenda – specifically *SDG 12 (responsible consumption and production)* and *SDG 2 (zero hunger)* – a new model of production and consumption must be promoted wherein the value of products, materials and resources is maintained in the economy for as long as possible, waste generation is minimised and unavoidable waste is utilised to the greatest extent possible (Sedeño López, 2021). In achieving these objectives, environmental taxation can facilitate the transformation of production and consumption patterns, prioritising recycled or reused products over single-use alternatives.

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2.2.1. The Right to Repair

In recent years, the "right to repair" has gained significant traction, with the EU taking steps to facilitate and encourage consumers to repair broken goods rather than dispose of them. Most measures comprise soft policies consisting of information requirements included in several ecodesign regulations and the Battery Regulation, alongside mandatory minimum requirements for the repairability of new products placed on the European market – notably Regulation (EU) 2023/1542 of the European Parliament and of the Council of 12 July 2023 concerning batteries and waste batteries, amending Directive 2008/98/EC and Regulation (EU) 2019/1020 and repealing Directive 2006/66/EC. Since 2021, manufacturers of a substantial proportion of electronic devices and household appliances have been required to ensure that components can be disassembled and spare parts are available for specified periods (Various Authors, 2024).

Regarding financial incentives, Regulation (EU) 2024/1781 – the Ecodesign for Sustainable Products Regulation (ESPR) – empowers the European Commission to establish mandatory EU-wide performance requirements for public procurement of certain products and to set targets for the proportion of environmentally sustainable products purchased, potentially providing significant incentives for manufacturers to produce more repairable products.

A direct approach to reducing repair costs involves lowering applicable taxation. The recently adopted Directive (EU) 2024/1799 on common rules promoting the repair of goods requires each EU Member State to develop at least one repair incentive, whether financial or otherwise.

2.2.2. Measures to Eliminate Planned Obsolescence and Taxation of Used Goods

Closely linked to the "right to repair" is planned obsolescence. In current markets, product lifespan and repair options are often constrained by manufacturer decisions and practices aimed at maximising profits. Planned obsolescence refers to situations wherein manufacturers deliberately determine a product's life cycle duration before it is introduced to the market. The underlying causes are purely economic: by reducing product lifespan, manufacturers compel consumers to purchase replacements.[6]

Electronic products generate substantial ecological footprints, being manufactured from precious raw materials using considerable energy. Extending their lifespan through repair therefore constitutes the most efficient means of reducing their environmental impact. As Sedeño López (2021) indicates, whilst this term is typically associated with electronics, it equally applies to other productive sectors such as the textile industry. Within a CE context predicated on the reuse and recycling of resources and extending a product's lifespan, planned obsolescence represents a practice that must be, if not eradicated, at least substantially reduced. The ESPR addresses these practices by requiring

ecodesign standards that ensure products do not become prematurely obsolete through design decisions, substandard components, software activation or similar mechanisms.

In this regard, the European Parliament resolution of 4 July 2017 on a longer lifetime for products: benefits for consumers and companies "encourages the Member States to explore appropriate incentives promoting durable, high-quality and repairable products, to stimulate repairs and second-hand sales, and to develop repairs training".

Paragraph 29 of Directive (EU) 2018/851 of the European Parliament and of the Council of 30 May 2018 amending Directive 2008/98/EC on waste explains that:

> [...] Member States should facilitate innovative production, business and consumption models [...] that encourage the increase of the lifespan of products and that promote re-use including through the establishment and support of re-use and repair networks, such as those run by social economy enterprises, deposit-refund and return-refill schemes and by incentivising remanufacturing, refurbishment and, where appropriate, repurposing of products.

Annex IVa mandates Member States to implement various measures, including "fiscal measures or other means to promote the uptake of products and materials that are prepared for re-use or recycled". Whilst lacking explicit reference to specific tax instruments, the European legislation opens possibilities up for States and recognises their competence to implement such measures.

Spain has done so, albeit tentatively, through Act 7/2022 of 8 April on waste and contaminated soils for a circular economy (LRSCEC, from its Spanish initials), which transposes the aforementioned directive. Whilst the Spanish legal system cannot be said to provide an authentic guarantee of the right to repair, we concur with Sedeño López (2021) that progress has been achieved through provisions promoting circular, repairable and upgradeable products (Article 18.1 a, c, e), requiring repairability information (Article 18.10) and enabling future regulations against premature obsolescence (Article 18.9).

Focusing on strictly fiscal measures, Value Added Tax (VAT) constitutes the most appropriate instrument for achieving this objective. The current VAT regime is harmonised under Council Directive 2006/112/EC, whose Articles 97 et seq. establish applicable tax rates in Member States: alongside the standard rate of no less than 15%, one or two reduced rates of no less than 5% may be applied to the provision of goods and services listed in Annex III of the Directive – though the super-reduced rate below 5%, which applies in Spain and other countries, does not apply in this context. References to used goods or repair and renovation services are scarce, limited to Annex III on medical equipment for the exclusive personal use of the disabled; paragraph 2 of Annex IV relating to "renovation and repairing of private dwellings"; and paragraph 1 of Annex IV, which includes

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"minor repairing of (a) bicycles; (b) shoes and leather goods; (c) clothing and household linen (including mending and alteration)". Since 2022, following the review of VAT rates introduced in Council Directive (EU) 2022/542, applying the reduced rate has become possible; however, we are not aware of any Member State that currently does so (Sedeño López, 2021).

Analysing the differential effects between reduced rates and penalties, we favour reduced rates that guarantee VAT neutrality without limiting the deductibility of VAT paid.

In Spain, the aforementioned reduced rates are applied restrictively, their full potential remaining unexploited. Housing repair services are taxed at 10% (Article 91.One.1.10 of Act 37/1992 of 28 December on Value Added Tax), whilst repair services for vehicles and wheelchairs for persons with reduced mobility bear 4% (Article 91.Two.2.1). However, other repair services not mentioned in said article are subject to the general 21% rate under Article 90. This represents a missed opportunity. We agree with Sedeño López (2021) that "minor repairing of bicycles, shoes and leather goods, clothing and household linen" should be included amongst the services subject to the 10% rate under Article 91.One.2, as permitted by Annex III of Council Directive 2006/112/EC.

Regarding goods supplies, the "Special regime for taxable dealers" applies to used goods sales; insofar as the tax rate applies to profit margins, we understand this favours the circular economy by reducing prices and encouraging consumption of such goods.

In civil transactions between individuals, used goods are subject to the Property Transfer Tax (ITP, from its Spanish initials), though in practice settlements are limited to high-value acquisitions or goods requiring registration. Sedeño López (2021) proposes solutions regarding taxation of different digital platforms for second-hand sales, which would simultaneously incentivise the exchange of used goods. This would involve making ITP liability contingent upon registration on the platform, establishing an exemption threshold below which incidental transactions between private individuals remain untaxed. Provided registration is maintained, the tax would accrue annually and, at each year's end, it would be determined whether the exemption threshold has been exceeded – this threshold should be sufficiently high to avoid discouraging use of such digital platforms. Under the current report requirements of these platforms (López Martínez, 2023), the Tax Administration is informed of the total amounts paid or owed during each quarter by each user, enabling transaction volumes to be determined per taxpayer. Thus, the Administration would acquire valuable information for combating the shadow economy, whilst use of these platforms would be encouraged by removing from fraud listings all those acquiring goods on digital platforms without self-assessing the ITP.

2.2.3. Measures Against Food Waste

According to UN data, 13.2% of food is lost on the way from farm to consumer, whilst an additional 17% is wasted in households, food services and retail. Beyond the economic, social and food security implications of food waste, there exists a direct problem related to greenhouse gas production and inefficient use of energy, labour, water and other environmental resources, as highlighted by Sedeño López (2024b).

Food loss persists throughout the production-to-consumption chain, causing harmful effects with significant economic, social and environmental impact (Pablos Mateos, 2024). Preventing food loss is reflected in target 3 of SDG 12 ("Ensure sustainable consumption and production patterns"), which proposes halving per capita global food waste.

The measures adopted in this sector exemplify legislative initiative within the SDG framework and the CE's incentive-based public policies. Food donation can contribute to reducing food waste; therefore, creating incentives in this direction is necessary to offer alternatives to food destruction or disposal. Pending more concrete measures,[7] action in the fiscal sphere operates through two tax instruments. The first is VAT, recently modified to alleviate the tax burden for donors. The second operates at local level through reductions in public service charges or waste management fees.[8] The measures adopted within these taxes result from the LRSCEC, which includes food donation as a preventive measure against its definitive loss, prioritising donation for human consumption.

2.2.3.1. The Tax Regime for Product Donations in VAT

The VAT reform results from the Commission's recommendation to remove tax barriers hindering food donation, following indications in the 2017 Commission Notice entitled ***EU Guidelines on Food Donation*** (2017/C 361/01). The third final provision of the LRSCEC modifies the VAT legal regime to ensure donors do not bear fiscal costs that might obstruct decisions regarding where to donate food waste.

The reform comprises, firstly, specification of criteria for establishing the VAT tax base when donated goods have experienced value variation due to use or deterioration. It should be noted that these donations involve products that have suffered deterioration – particularly from a commercial perspective – whilst remaining suitable for consumption (Sedeño López, 2024b; Pablos Mateos, 2024). Secondly, a new 0% tax rate is established, whose application must be interpreted broadly – it applies both to products that have undergone deterioration and to new, unused or good-as-new products (Arana Landín, 2024).

Application of both measures requires two conditions to be met. Firstly, there must be a transfer of goods (an objective requirement). Secondly, the donated

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products must be used for general interest purposes as defined in Article 3, paragraph 1 of Act 49/2002 on the Tax Regime of Non-profit Entities and Tax Incentives for Patronage (a purposive requirement). These purposes include environmental protection and support for persons at risk of social exclusion for physical, economic or cultural reasons. The recipient must be a non-profit entity as defined in Article 2 of Act 49/2002.

Two relevant VAT aspects significantly affect this regime. The first concerns self-consumption: under Article 9 of the VAT Act, donations constitute external self-consumption and are therefore subject to taxation rather than exempt. Consequently, the entrepreneur or professional making the donation must bear the corresponding VAT cost. The second relates to tax base determination: rule 3 of Article 79 of the VAT Act establishes that the tax base shall be the value of the goods at the time of delivery. Following recent modification, this provision now presumes that donated goods are impaired, thereby establishing a zero tax base as the appropriate treatment for food donations.

The second measure establishes a 0% tax rate (paragraph two of the third additional provision of Act 7/2022 amending Article 91 of the VAT Act), which reinforces the impairment presumption and consequently the zero basis for VAT.

Whilst both measures succeed in eliminating fiscal barriers that the VAT self-consumption regime entailed for food donation, they have simultaneously generated problems related to tax system coherence. On the one hand, these constitute two repetitive measures – merely considering a zero tax base or applying a zero tax rate would have eliminated taxation. The latter proves more appropriate considering the negative effects that zero tax base determination causes on donation deductions under Personal Income Tax and Corporate Income Tax, as it cancels the deduction base by rendering assets worthless.

Furthermore, in Article 18.1 of the LRSCEC, the legislator exceeds EU recommendations by referring not only to food donation but also, as a separate category, to the donation of certain products such as electrical appliances, textiles and furniture. On the other hand, however, this extension to other product types represents an initiative that is consistent with the circular economy transition project, which must be applied across all possible sectors.

3. Conclusions

Throughout this work, the connection between the SDGs of the 2030 Agenda and the CE model in certain strategic sectors has been analysed, highlighting how these approaches are not only complementary but mutually reinforcing in achieving sustainable development. The CE, with its focus on reducing consumption and promoting reuse and recycling of resources, offers an effective pathway to meeting several SDGs, particularly those related to environmental sustainability, combating climate change and promoting inclusive and sustainable economies.

The transition to a CE can be approached from different perspectives and strategies, ranging from decarbonisation to sustainable production and consumption.

EU economic policies focus on transitioning to a clean and circular energy model; in pursuit of this goal, energy taxation plays a crucial role in the energy transition by incentivising cleaner energy sources whilst taxing those that pollute the most. The European Green Deal, framed within the European Union's climate goals, proposes revising the Energy Taxation Directive to encourage renewable energy use whilst discouraging fossil fuel consumption. However, ensuring a just transition requires balancing the momentum towards decarbonisation with measures protecting the most vulnerable households and sectors, preventing environmental policies from exacerbating inequalities.

Meeting climate targets also necessitates a transition to sustainable transport, especially as regards electromobility. This requires combining technological development with fiscal and financial policies to encourage electric vehicle use, both in terms of acquisition and ownership.

The problem of planned obsolescence represents a significant challenge to environmental and economic sustainability. Promoting product repair and reuse presents one of the most effective strategies for mitigating the ecological impacts of waste and reducing the carbon footprint associated with manufacturing and mass consumption. In this context, tax incentives – such as applying reduced VAT rates on repair services and second-hand goods sales – can serve as powerful tools for encouraging repair over new product purchases.

The global problem of food waste has also been addressed in Europe. Spain's LRSCEC has implemented fiscal measures incentivising food donation in line with the SDGs. The VAT reform facilitates food donation by eliminating the tax burden on the free delivery of food, whilst at the local level, the obligation to pay for waste generation as part of the waste service fee is intended to encourage a reduction in waste production at both domestic and business levels. In this

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regard, a bonus of up to 95% is established for companies in the food sector. However, since its application is voluntary, it depends on municipal decisions and could generate disparity in its implementation.

These measures exemplify current trends in Spain towards a transition to a circular economy, following European guidelines and perfectly aligned with the 2030 Agenda. Therefore, integrating the CE into public policies, supported by appropriate fiscal incentives, proves an effective strategy for meeting the SDGs and advancing towards an economic model that promotes social welfare, economic growth and environmental protection.

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Notes

1 Commission Notice COM (2021) 550 final.

2 This regulatory framework is completed by Regulation (EU) 2023/851 of April 2023, which prohibits the sale of new vehicles with internal combustion engines from 2035.

3 These constitute one of three mechanisms through which public administrations can access European funds (Sedeño López, 2024a).

4 Royal Decree-Law 3/2025 of 1 April, establishing the programme of incentives linked to electric mobility (MOVES III) for 2025 (*Official State Gazette* of 1 April). This plan will subsequently be replaced by the "Spain Auto 2030 Plan" for 2026, presented on 3 December (https://www.lamoncloa.gob.es/lang/en/presidente/news/Paginas/2025/20251203-spain-auto-2030-plan.aspx).

5 We are aware that other Personal Income Tax deductions exist for vehicles provided as benefits in kind, which predate Spain's Recovery, Transformation and Resilience Plan (PRTR).

6 There are two broad categories of planned obsolescence: objective and subjective (Ruiz Malbarez and Romero González, 2011). Whilst objective obsolescence is based on the inherent characteristics of the product, subjective obsolescence is linked to marketing techniques and the creation of perceived needs, leading consumers to regard a product as obsolete (psychological obsolescence).

7 The Draft Prevention of Food Losses and Waste Bill is currently under consideration, aiming to ensure SDG compliance, reduce food loss through proper food management and promote the circular economy.

8 Due to space constraints, further examination of this issue is beyond the scope of this paper.

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ARTICLES/ARTÍCULOS

Between the Rejection of Work and Uncertainty: Exploring Young People's Narratives on Life Trajectory Construction in the Basque Country

Entre el rechazo del trabajo y la incertidumbre. Aproximación a los discursos acerca de la construcción de trayectorias vitales de las personas jóvenes en Euskadi

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ABSTRACT

This article examines the narratives of young people in the Basque Country concerning the construction of their life trajectories within a context shaped by uncertainty and a growing rejection of traditional employment models. Drawing on a qualitative methodology based on in-depth interviews, it analyses the perceptions and strategies developed by these young people to navigate labour market precarity and a lack of opportunities. The findings reveal a diversity of approaches and attitudes towards work, highlighting the central role of education, continuous training and social support networks. This study contributes to a deeper understanding of how Basque youth navigate a changing labour market and the structural challenges they face in striving to build a stable and meaningful life.

KEYWORDS: youth precarity; uncertainty; life trajectories; discourse analysis; sociology of work; rejection of work.

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RESUMEN

Este artículo explora los discursos de los jóvenes vascos en torno a la construcción de sus trayectorias vitales en un contexto marcado por la incertidumbre y el rechazo al trabajo tradicional. A través de una metodología cualitativa basada en entrevistas en profundidad se analizan las percepciones y estrategias que estos jóvenes desarrollan para afrontar la precariedad laboral y la falta de oportunidades. Los resultados revelan una diversidad de enfoques y actitudes hacia el empleo, destacando la importancia de la educación, la formación continua y las redes de apoyo social. El estudio contribuye a la comprensión de cómo la juventud vasca navega en un mercado laboral cambiante y los desafíos que enfrentan para construir una vida estable e íntegra.

PALABRAS CLAVE: precariedad juvenil; incertidumbre; trayectorias vitales; análisis de discurso; sociología del trabajo; rechazo del trabajo.

1. Introduction

This article reflects on the resistance to work and the pursuit of stability among young people in contemporary society. The current generation of young people seems to be caught between a blurred and distant future and a past that no longer fits with present-day notions of life, as if awaiting guidance or direction that never quite materialises. Is it that ever more is required in order to achieve stability? What obstacles do young people face in their quest for such stability? What alternatives and life trajectories are they developing in response to the instability and uncertainty surrounding both their personal and collective futures?

The pervasive nature of precarious employment poses a significant challenge to traditional notions of stable work, profoundly shaping the formation of life projects and trajectories among young people. Far from following a linear and coherent course in work and life, today's young people are building their lives amid obstacles, uncertainty and a sense of guilt.

The rise and consolidation of neoliberalism has clearly transformed both the world of work and prevailing understandings of employment. Employment, once considered a factor that guaranteed a degree of material or symbolic stability, now contributes to the precarisation of life across all spheres. Young people's development and ways of life are increasingly marked by uncertainty, immediacy and the demands of a socio-economic order that has succeeded in colonising virtually every aspect of life: our relationship with the labour market, with resources, with institutions, with others and even with ourselves. Unemployment, temporary contracts and overqualification are presented to young people as naturalised phenomena, leaving them with little option but to adapt to precarious conditions in order to move forwards.

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Shifts in labour dynamics and working conditions have placed precarity at the centre of young people's experiences in today's society. This phenomenon, together with evolving expectations and life needs within this generation, presents significant challenges and calls for in-depth reflection.

This research arises from the need to understand how precarious employment conditions are shaping the experiences and outlooks of young people in the Basque Country. The core issue addressed by the study is how young people's life plans and trajectories are being adapted to a labour context defined by precarity. In doing so, the study questions the central role of employment as a guarantor of both individual and social development.

The aim is to examine how life projects and paths are being shaped in a labour environment characterised by instability. To this end, a qualitative methodological approach has been adopted, based on in-depth interviews designed to capture the personal experiences and perspectives reflected in young people's narratives.

2. Theoretical Framework

2.1. Young People as a Vulnerable and Precarious Group

Sociological research into young people experiencing precarity is essential given the social, political and economic changes they face, as well as the evolving role of the welfare state in contexts marked by austerity (Ibáñez, Fernández and Alonso, 2017). According to the study *Youth, Emancipation and Housing Needs in the Basque Country*, conducted by the Basque Youth Observatory (2021), 35% of young people aged 18 to 34 had achieved emancipation. However, the follow-up study carried out two years later, in 2023, reveals that access to housing has become increasingly difficult, with only 31% of young people in this age group living independently.

Similarly, the study *Youth in the Basque Country in the Labour Market. Analysis of the 2021 Labour Market Census*, also conducted by the Basque Youth Observatory (2021), shows that over half of employed young people hold temporary contracts, while the majority of unemployed young people have previous work experience, although only a minority receive any form of economic support.

Nonetheless, defining youth remains a complex task. Ballesté and Feixa (2019) highlight its heterogeneity and intersectionality, while Bourdieu (1990) stresses the importance of understanding youth as a social construct. Villa (2012) suggests referring to "youths" in the plural, in order to capture the idea of a collective composed of heterogeneous individuals who share certain social and living conditions but are also shaped by varying forms of domination and power.

The transition to adulthood for previous generations followed a more linear pattern, generally based on economic and residential independence, integration into the labour market and the formation of a nuclear family. By contrast, the life trajectories of today's young people are more diffuse, fragmented and less clearly defined, diverging from these traditional pathways (Casal, Merino and García, 2011).

Analytical perspectives on youth transitions and the formation of adult life vary considerably. Some focus on subjectivity and individual agency, portraying young people as active decision-makers regarding their futures and emancipation (Moreno, López and Sánchez, 2012). Others, however, question the assumption that young people have access to a range of opportunities, pointing instead to the social and employment-related barriers that are difficult to overcome.

Young people often experience obstacles and repeated shifts in decision-making as they move towards economic and residential independence. There is frequently a mismatch between socially expected transitions and young people's own perceptions of their journey to adulthood. Structural factors such as the socio-economic context, gender, age, education and ethnicity all shape these processes of emancipation and the trajectories followed by young people (Moreno et al., 2012). A historical and social analysis of the transformation of work under capitalism is therefore essential in order to understand the perspectives and decisions that shape this field.

In order to describe this condition of precarity, Guy Standing (2014) introduces the concept of the "precariat" to designate a new social class characterised by the absence of stable income, the lack of a professional identity and the erosion of a cohesive and supportive labour community. However, this should be understood as a totalising concept, which may fall short in capturing "the profound differences that exist among precarious workers, which are rooted in structural inequalities related to family background, economic, cultural or symbolic capital, and their role within the productive process" (Gil and Rendueles, 2019, p. 31).

For this reason, and in an effort to avoid obscuring the dynamics of class struggle under advanced capitalism, it is essential to examine the evolving nature of labour conflict within the capitalist system. In the context of post-Fordist capitalism, a process of increasing precarisation can be observed, marked by the deterioration of working conditions and a growing sense of institutional uncertainty. Scholars such as Giddens (2008) and Bauman (2017) highlight rising job insecurity and low wages among young people, whose ways of life are shaped by a complex interplay of economic, political and cultural factors.

Precarity is thus conceived as a condition of deprivation or insufficiency that extends beyond the sphere of employment. It is therefore crucial to consider the multiplicity of factors that contribute to young people's precarious lives, including not only economic and occupational but also social dimensions (Gil and Rendueles, 2019).

The sociological study of the 18–29 age group is particularly relevant, as this population represents a significant segment of society. In Spain, for example, the Youth

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Institute (INJUVE) defines youth as falling within this age range and structures its programmes and policies in areas such as employment, training and social participation accordingly. Youth policies are primarily targeted at this group, as it constitutes a pivotal stage for gaining access to stable employment, continuing education and full integration into society (INJUVE, 2020).

Nevertheless, youth is recognised as a diverse category, with situations and ways of life that vary depending on the spatial and historical contexts in which young people are located. This study will therefore focus on the labour and economic conditions of young people within this age group, while acknowledging the plurality and diversity of their lived experiences (Taguenca, 2009).

2.2. The Construction of the Social Problem of Employment: From the Origins of the Concept of Work to Contemporary Employment

Work is a fundamental social relationship that has played a central role in the cohesion and integration of societies. However, its conception as a social activity is historically specific. Hegel (2017) defines work as the uniquely human way of relating to nature. Paid work, or employment, is not simply another sphere of daily life detached from social, political and economic norms. Rather, "it can only be understood as a transformative relationship with nature within a process of interaction with others of our own species in order to carry out that transformation" (Martínez, García and Prior, 2016, p. 264).

Weber (1901, 1969) analyses the relationship between religious ethics and capitalism, showing how work may be experienced either as a moral obligation or as sheer economic compulsion. Marx (1978), in contrast, underscores the alienating nature of labour under capitalism, in which human relationships are reduced to relationships between things. Foucault (2002) extends this critique in *Discipline and Punish*, examining disciplinary power as a cornerstone of the modern social order and exploring the use of control mechanisms such as the panopticon to impose discipline and normalise behaviour.

Although recent sociological theories of labour relations have incorporated a variety of analytical perspectives, some scholars continue to focus on specific elements such as rational choice, individual agency, labour market structures and institutional dynamics. Labour relations are also shaped by intersecting factors such as gender, ethnicity and social class. Sociologist Joan Acker (2000), for example, explores how gender hierarchies are reproduced within labour relations and organisational structures.

Today, both institutions and the social sciences examine a broad range of factors that intersect with social reality and shape the processes of individual socialisation. The "network society" described by Castells (1999), in the context of informational capitalism, highlights the influence of media and digital social networks on young people's lives. Nonetheless, paid work continues to occupy a central role, generating precarity and shaping aspects such as access to leisure and economic security.

Another key dimension when analysing employment as a social fact and structure is the work ethic. According to Bauman (2017), the work ethic is rooted in the idea that work is inherently valuable and morally superior, while inactivity is viewed negatively. This conception played a vital role in the civilising process and in structuring modern society, placing work at the heart of both personal identity and social life. Within this framework, unemployment was synonymous with social exclusion and a lack of supervision and control.

Today, however, this work ethic has undergone a profound transformation. According to Bauman (*ibid.*), in consumer societies the moral value once attached to work has been supplanted by the *aesthetic of consumption*, which now governs social behaviour. The emphasis on individual choice in the marketplace has weakened support for welfare policies, while declining quality in public services has further undermined their legitimacy: "consumerism and the welfare state are therefore incompatible" (*ibid.*, p. 92).

Despite these transformations, the work ethic remains dominant. Employment continues to be exalted as a source of stability and personal integrity, while unemployment is stigmatised (Frayne, 2017). Society still equates employment with maturity and social commitment, disregarding other forms of contribution (*ibid.*) and framing poverty and inequality as individual failings rather than structural problems.

Gender is also a central factor in shaping labour relations, interacting with capitalism to reproduce structural inequalities. Authors such as Zetkin (1976), Kollontai (2011), Millet (2017) and Fraser (2015) have examined the subordination of women within the labour system. Labour market segregation, technological control and the division between paid work and unpaid domestic labour are all forms of patriarchal organisation embedded in capitalist labour relations (Hartmann, 1994). Likewise, authors such as Butler (2007) and Gómez Bueno (2001) challenge the work–employment relationship from an intersectional perspective, proposing a capabilities-based approach to rethinking development economics.

2.3. Work from the Perspective of Subjectivation: Existential Uncertainty and the Rejection of Work in Consumer Societies

The sociology of work must address the relationship between subjectivity and employment in order to understand the transformations taking place in labour relations. Following Casal et al. (2011), the social actor is conceived as the protagonist of their own life, articulating rationality, emotions, social constraints and strategies for the future. In this sense, subjectivities are formed in relation to the evolution of social structures.

The flexibility of production and its effects on workers, as explored by Dubet (1999), remains highly relevant, as work continues to play a central role in constructing both individual and collective identities. Alonso (2000) critiques the dismantling of Fordist employment and the erosion of job security, resulting from neoliberal discours-

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es that promote competitiveness and flexibility. Labour precarity, especially among young people, generates instability and reshapes their position in society (Castells, 1999).

Lazzarato and Negri (2001) introduce the concept of immaterial labour, which not only produces goods but also configures social relations across production, innovation and consumption. This process is linked to Foucault's (2002) notion of *biopower*, which regulates bodies and populations in service of capital. Within this framework, Deleuze (1993) observes a transition from disciplinary societies to societies of control, in which instant communication and consumerism supplant traditional disciplinary mechanisms. The dynamics of consumer society undermine social cohesion (Bauman, 2017), replacing Foucault's (2002) disciplinary control mechanisms with the logic of consumption.

Control society fragments individuals, making them increasingly vulnerable within flexible capitalism (Boltanski and Chiapello, 2002). Neoliberal psychopolitics fosters self-exploitation and continuous productivity (Han, 2014), replacing coercion with motivation and embedding a moral dimension that legitimises the system (Boltanski and Chiapello, 2002). Instead of reducing work through gains in productivity, capitalism absorbs potential free time by expanding the market and commodifying new areas of life (Frayne, 2017, p. 80). Technology, far from granting greater autonomy, intensifies control over workers (Frayne, 2017). Simultaneously, work infiltrates private life through connected devices, blurring the boundaries between working time and leisure (Adorno, 2008), and giving rise to new forms of exploitation and reproduction of subjectivities (Browne, 2007).

The lingering influence of the modern work ethic, combined with the rise of neoliberal *psychopolitics* (Han, 2014) in consumer societies, may therefore represent a key force in shaping the identities and subjectivities of young people. This does not imply disregarding the role of social action and the potential for creating spaces freed from domination, as Pagura (2008) warns. Rather, it calls for renewed attention to structural analysis and the role of the productive system in shaping the subjectivities and actions of young people in a context where such interpretative frameworks remain limited.

In his research on the refusal of work, David Frayne (2017) interviews individuals in the United Kingdom who have voluntarily chosen to reduce the prominence of paid employment in their lives, either by cutting their working hours or temporarily withdrawing from the labour market. He begins with the premise that sociological research "may have unwittingly reinforced the work ethic, in so far as researchers have treated work unquestioningly" (*ibid.*, p. 99), without exploring the possibility that autonomous social networks and community-managed production models could reduce reliance on formal employment.

Frayne's (2017) narratives and observations reveal a *moment of rupture* or *de-reification* – a concept originally coined by Marx and later developed by Berger, Luckmann

and Zuleta (1968) in *The Social Construction of Reality* – to describe the process by which individuals overcome the forgetting of the fundamental truth that human beings are the creators of the social world. In other words, the individuals interviewed identify the point at which wage labour ceases to be seen as an inevitable destiny and becomes subject to critical reflection.

Their insights into employment show that the desire to resist is often driven by a perceived lack of meaning and autonomy in the workplace. Functional social roles, such as paid employment, can never fully encompass the complexity of individuals who are compelled to occupy them. There is always a part of the self that exceeds the social role and yearns for liberation (Frayne, 2017, p. 128).

3. Objectives and Methodology

The general aim of this research is to analyse the processes through which young people adapt their life projects and trajectories to contexts of precarity in contemporary Basque society. These adaptation processes and trajectories are examined from two interrelated perspectives: on the one hand, through the structural dynamics of the labour market and Western social systems, and on the other, through the lens of individual subjectivity, understood as being in constant interaction with social structures and other actors.

To this end, four specific objectives have been established, addressing the multi-causal nature of these adaptation processes. The first objective is to explore young people's personal expectations for the future, covering multiple dimensions such as employment, economic stability and interpersonal relationships. The second aims to identify the factors through which precarity is manifested in young people's lives, conceptualising precarity as a phenomenon made up of shared indicators. The third seeks to analyse changes in young people's essential life needs, where "essential" refers to their expectations, goals and critical reflections on their own trajectories. The fourth and final objective is to examine the current role of employment in young people's lives by analysing their relationship with the labour market.

This analysis is grounded in an understanding of subjectivity as being shaped through ongoing interaction with social structures and other individuals. For this reason, the final analysis draws on data collected through the qualitative method of discourse analysis. A total of six interviews were conducted with young people aged 16 to 29, selected using non-probabilistic snowball or network sampling techniques. This approach helps to minimise potential biases and expand the diversity of participant profiles.

In qualitative research, sample size is not determined by statistical criteria but by the depth and richness of the data gathered (González, Pérez and Rodríguez, 2015). The aim of this study was not to achieve numerical generalisability, but rather to conduct an in-depth exploration of young people's discourses in the Basque Country

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regarding uncertainty and the rejection of work. Previous studies have shown that a small number of interviews may suffice when the focus is on shared meanings and situated experiences (Charmaz, 2006). Moreover, the purposive selection of participants enabled access to discursive diversity within the phenomenon under investigation. Although the sample size was limited, the data reached a point of thematic saturation, meaning that recurring patterns were identified and no substantially new information emerged from further interviews (Corbin and Strauss, 2015).

The analysis aimed to identify relationships, convergences and divergences across individual narratives in order to understand the processes through which young people adapt to precarious contexts and how their life projects and trajectories are reconfigured. The study focuses exclusively on residents of the Basque Country in order to provide a more detailed understanding of how life trajectories are shaped within the regional context.

The profile of the interviewees is presented in Table 1.

Table 1

Interviewee profiles

Interview	Age	Student	Employed	Living independently	Gender
I1	23	No	No	No	Male
I2	24	No	Yes	Yes	Female
I3	24	Yes	Yes	Yes	Female
I4	17	Yes	No	No	Female
I5	29	No	Yes	Yes	Male
I6	24	No	Yes	No	Male

These interviews made it possible to capture the individual perspectives and lived experiences of young people in relation to their life projects, future expectations, the obstacles and challenges they face, as well as their perceptions of precarity and the role of employment in their lives. A hermeneutic approach was adopted, allowing for the identification of emerging categories and themes within participants' discourse. The analysis focused on detecting patterns, contrasts and divergences in the experiences and perceptions shared by the young people interviewed.

Manual, inductive coding was carried out through iterative readings of the interview transcripts. An interpretive approach was applied, using an inductive coding strategy based on a hermeneutic perspective inspired by grounded theory. The method of thematic analysis developed by Braun and Clarke (2006) was followed, with the aim of identifying, analysing and interpreting patterns within qualitative data through a flexible framework that allows for the exploration of meaning in discourse.

One of the key advantages of manual analysis is that it enables a deep, reflective engagement with the material, fostering a contextualised interpretation of participants' discourse (Mieles, Tonon and Alvarado, 2012). By not relying on software, the researcher maintains direct contact with the data, facilitating the recognition of nuances and emerging meanings (Charmaz, 2006). Moreover, manual coding allows for dynamic adjustments throughout the analytical process, enabling the refinement of categories as the study evolves – an approach well documented in ethnographic research (Corbin and Strauss, 2015).

In this way, categories were established according to the discursive elements most relevant to the research objectives (see Table 2).

Table 2

Discursive elements identified in the interviews

Discursive elements	I1	I2	I3	I4	I5	I6
Has worked temporarily	✖	✖	✖	✖	✖	✖
Identifies "self-pressure" as a key factor	✖	✖	✖	✖	✖	✖
Expresses a desire for support and guidance during the transition to employment	✖	✖	✖	✖	✖	✖
Reports that uncertainty shapes their life trajectory	✖	✖	✖	✖	✖	✖
Aims to continue their education, albeit without a defined plan	✖	✖	✖		✖	✖
Expresses rejection of the idea of "stagnation"	✖	✖	✖	✖		✖
Does not see their own life trajectory reflected in that of their parents	✖	✖	✖	✖	✖	✖
Does not perceive any improvement in conditions for young people	✖	✖	✖			✖

4. Analysis of results: Narratives of fragmented trajectories

At present, young people are confronted with the absence of a clear roadmap for transitioning into adulthood, resulting in frequent changes of direction driven by failed attempts and trial-and-error strategies in their pursuit of residential and economic independence.

The discourse analysis of interviews conducted with individuals aged 16 to 29 has provided valuable insights into multiple aspects of this process and has brought to light certain emerging trends. The life trajectories of the interviewees – in the employment, economic and relational spheres – differ in how they are narrated. However, certain core pillars appear consistently across all, or the vast majority of, the narratives and remain present throughout the interviews.

The interview script followed a broadly chronological structure, beginning with participants' school experiences and family relationships, and subsequently moving to the stage at which they begin to make – or are expected to make – decisions regarding their future career paths. The analysis also focused on discursive elements shared by those who had engaged with the labour market, as well as on their perceptions of

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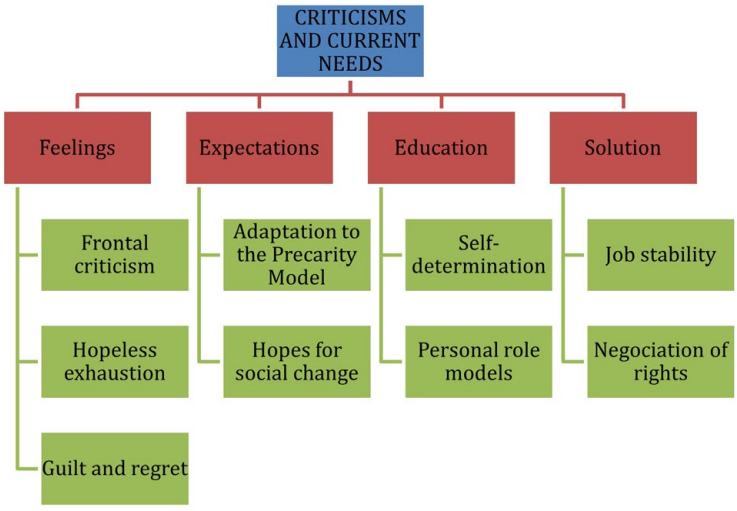
the experiences of close individuals in their social environment. Particular attention was given to the material and working conditions of employment, and to how these influence the formation of mental frameworks regarding work and employment. Finally, and crucially, the interviews sought to delve into participants' future outlooks and how they tend to adapt their aspirations to their current context.

As already noted, the transition to adulthood for young people today cannot be considered linear, nor can it be based on the traditional markers of integration associated with earlier generations, such as labour market insertion, residential independence and conjugal union. The ways in which young people enter and navigate the labour market vary and are closely linked to their educational pathways (Casal *et al.*, 2006). These transitions may be relatively straightforward or more complex, depending on each individual's educational background and level of training. Some young people experience rapid and uncomplicated labour market entry, often associated with lower educational attainment or early school leaving. Others, by contrast, undergo more complex transitions involving successive stages and the need to develop specific strategies.

In such cases, the strategies adopted depend on factors such as field of study, job market requirements, available opportunities and the level of family support during the education period. Educational attainment, social capital and cultural capital also play a decisive role in shaping these transitions, as individuals with greater access to such resources are generally better positioned to adapt to the labour market than those with lower levels of education and limited social support (Artiles et al., 2018). Figure 1 presents the conceptual map of the themes and topics analysed in the narratives concerning the life trajectories of the interviewees.

Figure 1

Discursive framework of life trajectories



4.1. Influences, References and Changes During the Educational Stage

The main criticism directed at the education system relates to its lack of preparation for working life, particularly the limited teaching of bureaucratic procedures and labour rights. While some participants acknowledged that education had offered a degree of preparation for flexibility in life more broadly, they did not feel that it had provided adequate technical or practical preparation for entering employment.

In terms of employment, there is a major lack of information on more practical matters – types of contracts, working conditions, collective agreements, trade unions... (I2).

Another key issue concerns the disconnect between the education system and the labour market, especially the rigidity in the selection of educational pathways. During the transition to employment, participants reported that curricular internships were often unfavourable to students and primarily beneficial to companies.

> I think education should be much more practical, and it should also guarantee internships for all students with a minimum salary, because the internships we've done were in exchange for nothing – not even a thank you. And I think we should have a bit more contact with real life, because it's really hard to be mentally strong when you come out of that situation already feeling abandoned (I3).

For many university-educated young people, higher education created expectations of autonomy and meaningful employment, which were subsequently frustrated upon entering the labour market. This often led to a point of rupture, prompting a reorientation of ambitions away from the world of work (Frayne, 2017, p. 132).

4.2. Goal or Obstacle? The Current Role of Employment in Young People's Lives

> Throughout history, work has played a fundamental role in socialisation, reaching its height during the Industrial Revolution. Although work is not perceived as disappearing, young people are increasingly less likely to view it as a mechanism of integration, due to growing labour flexibilisation and the ongoing exploitation of the workforce.

Upon entering employment, young people frequently experience feelings of disillusionment and shock, as they do not feel adequately prepared for the realities of working life. Job insecurity and the prevalence of temporary contracts are recurring themes in their narratives, forcing them to accept short-term and flexible employment arrangements.

> I've almost always worked in temporary jobs, with short shifts so I could combine them with university and, well, I've been managing more or less like that. [...] What weighs on me is the idea of losing my job and having to move back home. I've been living on my own for six years, and if my contract ends tomorrow, I really don't know what I'd do... (I3).

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The subsumption of life under capital (Marx, 2008), as theorised in Marxian thought, becomes evident as production extends beyond the workplace and penetrates all aspects of young people's lives. This results in a situation in which "the consumer lifestyle becomes increasingly unattainable for low-income groups, historically defined by a fixed purchasing capacity that enables them merely to secure subsistence or meet their basic needs" (Bauman, 2017).

As previously discussed, emancipation and residential independence are increasingly difficult for young people in the Basque Country, generating mounting anxiety and uncertainty. Shared rental arrangements have become the most common option, yet even those who do manage to achieve emancipation often find themselves in precarious housing conditions.

> Right now I have a one-year job and a decent salary, which allows me to be independent from my parents. [...] I applied for youth rental support, which gives me a bit more breathing room. [...] I also lived in Madrid for a year, and it was absolutely desperate – literally crying at night and saying: "All I've seen are windowless holes, and they're all beyond my budget," you know? [...] There wasn't a single place with windows for €400, and it was incredibly disheartening (I3).

The dominant discourse reflects the difficulty of accessing employment with decent conditions. Moreover, once employment is obtained, the precarious nature of working arrangements – particularly in relation to working hours and pressure – makes it difficult to balance work with personal life. As a result, residential emancipation remains a challenging objective and, when achieved, is often experienced as unstable and insecure.

4.3. Personal Expectations for the Future: The rejection of work amid a distorted horizon

Young people express a growing tendency to reject salaried employment, driven by multiple factors. Firstly, they seek to avoid stable employment due to dissatisfaction with current working conditions. In response to this discontent, many turn to further education and skill development, aligning with the ideal of continuous self-optimisation promoted by contemporary psychopolitics.

> I have a one-year contract, which guarantees me absolutely nothing. In a kind of desperation about the future, I enrolled in another master's in human resources, thinking it would lead to more job opportunities – but I really don't enjoy it at all. It feels like giving in to the labour market, because I don't see much of a future in my field (I3).

However, Han's (2014) notion of self-exploitation does not fully capture this reality, as young people do not pursue optimisation solely as a conscious choice but also as a consequence of adverse material conditions that compel them to reconsider their life trajectories. Educational optimisation is not always a desired goal, but rather a strategy for escaping a problematic labour context.

Although some elements of their discourse may suggest a rejection of the stability associated with *adult* life, what is ultimately being questioned is a life centred on salaried work – one that dominates daily routines and leaves little space for community, creativity or personal fulfilment.

This perspective also challenges the *false dichotomy* underlying the work dogma that Frayne (2017) identifies in his research – the widely held belief that individuals must choose between work and idleness, which devalues the social significance of activities not formally recognised as employment. As Frayne notes, based on the testimonies gathered in his study: "the decision to resist work was never motivated by laziness, negligence, or an aversion to productive activity. [...] The decision to resist work was always motivated by a powerful set of alternative moral principles" (*ibid.*, p. 113).

Another key factor underpinning this rejection – or refusal – of work relates to the difficulty of securing employment despite high academic performance. The persistent trend of accessing precarious jobs prompts young people to seek alternative paths and experiences, even when these lead to irregular and unstable trajectories. The lack of clear reference points in the transition to adulthood further reinforces this sense of stagnation.

> My idea is to go back to studying so I don't get stuck too early. One thing I noticed in my last job was that there were people my age, with responsibilities, doing that same job – and that really overwhelmed me. That's why I've decided to study again or at least try something new (I1).

The generational gap between young people and their parents also plays a role in shaping this rejection of stability, as the contexts and experiences of both groups differ significantly.

> I would have liked, above all, to have role models – people I could look up to, not necessarily in terms of work, but in terms of practical life. Someone closer to my age, who had only recently started working, but who also had this drive or desire to become independent, to be as self-sufficient as possible... (I2).

In summary, interconnected factors – such as experiences of labour precarity (including temporary jobs and roles unrelated to vocational interests) and the insecurity surrounding life trajectories – contribute to the growing tendency among young interviewees to reject traditional models of work.

4.4. Changes in Essential Needs

Young people tend to conceptualise their life trajectories differently from those of their parents, leading to a sense of disorientation in shaping their own paths. This rupture in the transmission of values and goals has resulted in a perceived disconnect – not only from their parents' experiences but also from the institutional framework of formal education. Participants frequently noted that their parents did not face the

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same degree of employment insecurity, exploitative conditions or, most notably, the pervasive uncertainty that characterises contemporary working life:

> At that age, when they were younger, I think they had more luck [...]. Obviously, things have changed a great deal, and at the time, finding a job and staying in it for 30 years was completely normal [...]. My father's level of education was probably the same or even lower than many people's today, and yet he secured a stable job. So I think it's just that things were different back then (I4).

Beyond material working and economic conditions, young people also identify shifts in the collective imaginary that set their generation apart from those that preceded it. These shifts influence how they construct their trajectories and lead to increasingly diverse outcomes. The intention, however, is not to draw direct comparisons, but to understand how each life course and future expectation is developed within its own contextual framework. Despite structural obstacles, young people continue to pursue a stable model of life – yet they are often forced to do so within dynamics of structural flexibility shaped by multiple constraints.

> We're starting to realise that those elements are not the formula for success or happiness that we were always told they were. There are so many other things we need – we need a care network, we need spaces where we can talk about this discomfort – and the fact that we don't have them is what's fuelling this uncertainty, even this rejection of work. We're realising that this formula, or these elements, no longer guarantee the kind of stability that having a job might have ensured 40 years ago (I2).

4.5. Critiques of Life Trajectories and Current Needs

Young people today find themselves in precarious situations and express a critical stance towards these conditions – yet this is often accompanied by a sense of exhaustion and hopelessness. Their discourse reflects a passive anticipation of events rather than active or collective engagement.

> Maybe I didn't do everything I should have done, and now – well, now the decisions aren't mine any more, and... There's nothing I can do about it, it's already done. That's it... There's no solution (I4).

Participants also express a strong desire for support and guidance during their educational and professional transitions – from teachers, parents and other significant figures in their lives.

> I really missed an education that focused more on self-determination, on being able to recognise myself as an active subject when making decisions or when shaping my own future (I2).

Despite increasing labour flexibilisation and the persistence of precarious conditions, a growing tendency can be observed among young people to reject not only work itself but also the conditions in which it takes place. This reveals a fundamental contradiction within capitalism – which requires a compliant labour force, but also a level of income and status sufficient to ensure its own social reproduction. Theories of psychopolitics and subjectivity suggest that this flexibilisation may be limiting young people's capacity for emancipation, raising questions about the very negotiability of their futures.

The ways in which interviewees respond to and interpret these tensions appear to reflect a broader social and normative rupture: a disjuncture between the linear, secure trajectory promoted by institutional and familial models of education and the flexible, unstable social reality that young people encounter. In the face of persistent difficulties in securing employment and life stability, participants' narratives reveal a latent discontent that has yet to be fully articulated as a social problem. While these narratives express clear rejection of precarity, they more closely resemble what Fisher (2016) refers to as "captured forms of discontent" – localised expressions of deeper systemic tensions that the social analyst must interpret and amplify as part of a broader critique of the prevailing political order (p. 120).

5. Conclusions and Discussion

Youth is a social construct shaped by historical, social and political factors, making it a diverse and intersectional category. In the transition to adulthood, life trajectories have become increasingly fragmented, marked by structural obstacles that profoundly affect young people's identities and lived experiences. Within this context, work is analysed as a social relationship that generates cohesion and contributes to identity formation – an activity that is historically and culturally linked to and shaped by power, technology, gender and subjectivity. However, labour flexibilisation under neoliberalism has eroded both employment-based identity and job security, disproportionately affecting vulnerable groups.

According to the report *Aurrera Begira 2022. Youth Expectations Indicators* by the Basque Youth Observatory (2022), the self-assessment of the present moment by young people in the Basque Country (aged 15 to 29) stood at 62 points out of 100 – the lowest value in the past four years. Moreover, income, employment status, leisure time and health emerged as areas with notable gaps between "perceived importance" and "actual satisfaction" (*ibid.*).

Young people's expectations for the future are shaped by employment precarity and shifting generational needs. Economic and labour insecurity directly impact emotional stability and overall quality of life. Nevertheless, the capitalist system tends to neutralise social critique by presenting its own logic as the only viable alternative (Boltanski and Chiapello, 2002). Han (2014) proposes dismantling psychopolitics as a form of domination – namely, "de-psychologising and emptying the subject so that they may be free for a form of life that does not yet have a name" (p. 62) – although he offers

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no concrete strategies for collective mobilisation. While cultural resistance may offer a potential means of challenging the dominant labour system, there is not yet a movement capable of displacing work from its central role in society (Frayne, 2017).

This raises important questions: Is there truly no way out? Is the power of capital and the control society so pervasive that it can co-opt and instrumentalise every form of resistance and opposition?

Globalisation has weakened the capacity of nation-states to manage conflict, contributing to a reconfiguration of identity in a world increasingly shaped by global flows (Castells, 2017, p. 21). Moreover, the state plays a role in the symbolic construction of social problems, often consolidating them as unquestionable realities (Bourdieu, 1997). For social conflict to emerge, disadvantaged groups must first become aware of their condition and challenge the legitimacy of the existing system (Coser, 1961).

At this juncture, it is worth asking whether Basque and Spanish societies are currently experiencing – or are likely to experience in the near future – a transition from interclass resentment to overt social conflict, driven by the stagnation of upward social mobility. More broadly, what is preventing such a transformation among younger generations?

Mark Fisher describes "capitalist realism" as the prevailing condition in which it becomes difficult to imagine alternatives to the current system. Overcoming this, he argues, requires the ability "to articulate what it is we do want – which will mean disarticulating technology and desire from capital" (2016, p. 115). Bauman similarly reflects: "Why are we so convinced that an economy not enslaved to the market is a contradiction in terms, and that rising inequality cannot be reversed? Utopia is our main weapon against the closure of debate" (2017, p. 150). Layla Martínez (2020) offers a related observation: imagining ever-worsening futures has stripped us of the ability to envision a better one. History is marked by victories, ruptures and moments of upheaval in which everything has been blown apart, creating the possibility of constructing something different. These movements of resistance have a global impact and give rise to new forms of life and cooperation, as production increasingly occurs through movement, collaboration and community.

Stress, anxiety and depression are not merely individual pathologies but symptoms of a labour model that alienates and perpetuates precarity (Frayne, 2017). Although work is often portrayed as a source of self-realisation, it frequently limits the development of creative and collaborative capacities. It is necessary to challenge the logic of economic rationality and reclaim the value of activities that fall outside the realm of paid employment (Bauman, 2017).

Overcoming the current crisis of work requires collective resistance, as proposed by André Gorz (1991), aimed at redistributing the benefits of productive development and reorganising labour relations around the principles of a freer and more dignified life. The acceleration of social change has transformed traditional labour

frameworks, giving rise to new forms of conflict and negotiation. In this context, it is essential to re-evaluate flexible employment, the unequal distribution of productive and reproductive labour, and the hegemonic logic of short-term profitability. Only then will it be possible to construct fairer and more democratic life trajectories.

This study has examined the relationship between youth, work and labour precarity from a sociological perspective, identifying the tensions and contradictions that characterise the current labour market. Nevertheless, there are certain limitations. The geographical and cultural context of the interviews may constrain the generalisability of the findings to other regions with different labour and social dynamics.

Despite these limitations, the study opens up new lines of inquiry, including longitudinal analyses of youth cohorts to better understand the evolution of their employment and life paths, examinations of how employment policies impact youth precarity, and critical debate surrounding the hegemonic centrality of work in social life. Research such as that of David Frayne, which explores the theory and practice of rejecting work, may serve as a useful reference for further exploration of youth discourses and trajectories in the Basque Country.

There is also a need to explore alternative models of wealth distribution, such as Universal Basic Income (Tena, 2018), and to expand the sociological debate around the rejection of work. This entails examining the extent to which new practices and ways of life are emerging that challenge productivist logic.

The transformation of the labour market and the questioning of work's centrality raise theoretical and political challenges that demand a comprehensive reassessment of current working conditions. Exploring new strategies for the redistribution of wealth and the reorganisation of social life may prove crucial in building more equitable, sustainable and fulfilling societies.

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ARTICLE/ARTÍCULO

Shaping Andalusians and Spaniards: The Construction of National Identity in Andalusian Schools

A preliminary study in the province of Seville

Formando andaluces y españoles: la construcción de la identidad nacional en la escuela andaluza

Una aproximación en la provincia de Sevilla

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ABSTRACT

This study investigates the construction of Andalusian identity within schools and its relationship with Spanish national identity. Drawing on theoretical frameworks of national socialisation and identity models – civic and ethnic–cultural – it analyses the extent to which education in Andalusia fosters a distinct regional identity, how this identity relates to Spanish identity, and the relative prominence of civic versus ethnic–cultural elements in its transmission. Findings reveal that Andalusian schools play an active role in reproducing regional identity, with a marked emphasis on ethnic–cultural components, while civic dimensions remain largely peripheral. Although Andalusian identity is not presented in opposition to Spanish identity, Andalusian speech stands out as a distinctive feature, often tied to a sense of grievance. Teachers emerge as key agents in transmitting these identity elements.

KEYWORDS: national identity; Andalusian identity; education; school; Andalusia; Spain; nationalism; cultural identity; civic identity.

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ABSTRACT

Este estudio analiza la construcción de la identidad andaluza en los centros educativos y su relación con la identidad española. Partiendo del marco teórico sobre la socialización nacional y los modelos de identidad (étnico-cultural y cívico), se investiga hasta qué punto la educación en Andalucía reproduce una identidad propia, cómo se articula en relación con la identidad española y qué tipo de elementos (cívicos o étnico-culturales) predominan en su enseñanza. Los resultados muestran que la escuela andaluza contribuye activamente a la reproducción de una identidad andaluza, pero con un fuerte énfasis en los elementos étnico-culturales, mientras que los aspectos cívicos tienen una presencia marginal. Además, la identidad andaluza no se presenta en oposición a la española, aunque el habla andaluza emerge como un elemento diferenciador asociado a una percepción de agravio. El profesorado desempeña un papel clave en la transmisión de estos contenidos.

PALABRAS CLAVE: identidad nacional; identidad andaluza; educación; escuela; Andalucía; España; nacionalismo; identidad cultural; identidad cívica.

1. Introduction. The Role of Education in the Construction of National Identity in Spain and Andalusia

This study examines the reproduction of Andalusian identity during compulsory secondary education (*Educación Secundaria Obligatoria* – ESO). While debates surrounding education systems in Spain have traditionally focused on historic communities such as Catalonia and the Basque Country, this article argues that Andalusia engages in similar dynamics of national identity reproduction as those other autonomous communities. It is assumed that any administrative unit with control over this mechanism of socialisation will use education (or schooling – used interchangeably here) to shape or homogenise a territorial identity that legitimises the existence of the administrative unit, whether current or prospective (Anderson, 1983; Hobsbawm, 1992).

Schooling is a fundamental agent in the formation of the modern state, becoming one of its core institutions (Green, 1990; Tamir, 2021). It has contributed to cultural homogenisation in favour of the dominant ethnic group, which holds the power to impose its narrative of the nation. However, this narrative has been challenged within multinational states (Kleider, 2020). In such contexts, tensions arise over control of education, as both state and sub-state elites share an interest in fostering feelings of belonging, which may at times be exclusionary. In this regard, the Spanish State's capacity to implement a nationalising educational policy has historically been constrained by the influence of the Catholic Church and by the devolution of competences to autonomous communities, each pursuing their own nation-building agendas (Puelles, 1999).

The first attempts to construct a Spanish national identity by progressive governments, in line with the mandate of the 1812 Constitution (Álvarez Junco,

2001, p. 545), were hindered by factors such as limited financial resources (allocated instead to the army or the clergy), the weak reach of public education (with illiteracy rates above 60%), and resistance from the Catholic Church, which, supported by conservative factions, has historically contested the State's control over education (*ibid.*, p. 549). It was not until the final years of the Second Republic that Spain established a public education system comparable to those of other European countries, mobilising resources and introducing reforms aimed at constructing a democratic Spanish national identity. This system was abruptly dismantled following the military coup and ensuing dictatorship of Francisco Franco in 1936.

With the approval of the Spanish Constitution (SC) in 1978, a decentralised model was adopted in which educational competences are shared between the State and the autonomous communities, with the latter assuming a substantial share of these responsibilities. Nonetheless, the distribution of competences remained unsettled. In accordance with Article 149, matters not explicitly reserved for the State by the SC were transferred to the autonomous communities in two phases: 1978–1983 and 1998–2000 (Hijano and Ruiz, 2016). In some instances, autonomous communities have used these newly acquired powers to develop distinct national identities, occasionally giving rise to tensions between state-wide and nationalist parties (Delgado, 2022), as well as between administrative levels, over control of education (Del Campo and López, 2015). As a result, a minority of autonomous communities (Catalonia and the Basque Country) prioritise the nation over the State in the construction of identity, while the majority reproduce dual identities based on a negotiated alignment of cultural norms and shared beliefs, generally privileging the State over the autonomous community (Doncel, 2008).

Andalusia has remained largely absent from many of these debates. Despite its status as a historic nationality – a status it shares with the Basque Country, Catalonia and Galicia – its political representatives have not followed the same trajectories. Its autonomous educational legislation has been amended only on a few occasions, with the 2007 Andalusian Education Act still in force. Curricular modifications have been aligned with national reforms, the most recent being the Order of 30 May 2023 adapting the LOMLOE (Organic Act on Education). This silence might suggest that Andalusia constitutes an exception among the autonomous communities in terms of the nationalisation of its student body. However, comparative studies on the development of regional identities within the education curriculum suggest otherwise (Doncel, 2008; 2016).

The existing literature on Andalusian identity (Moreno, 2008; Aguiar and Espinosa, 2011; Pérez Yruela, 2014; Coller, 2014) has examined the nature of Andalusian national identity, including its core values and the meanings attributed to being Andalusian and Spanish. Nonetheless, there is a notable lack of research specifically applied to the educational sphere, which has not been explored to the same extent as in the case of the other historic nationalities. Studies published in the Andalusian context have primarily focused on the analysis of textbooks and educational legislation (Hijano, 2000; Ruiz, 2001; Méndez, 2003; García and Merchán, 2015; Hijano and

Ruiz, 2016). To date, limited attention has been paid to the role of teachers as agents in the construction of Andalusian identity. This is the area in which our research seeks to contribute, by examining the reproduction of Andalusian identity through the actions of teachers, given their central role in the process as the individuals who ultimately interpret and implement educational policy.

The structure of this article is as follows. First, we set out the theoretical framework, outlining the hypotheses under investigation. We then present the research methodology and design, followed by an analysis of the data. The final section concludes with a discussion of the findings and the conclusions drawn in relation to the proposed hypotheses.

2. Socialisation, Schooling, Nation and State

Societies depend on the socialisation of their members in order to survive. Through socialisation, individuals internalise the values, norms and cultural frameworks of the society to which they belong. The capacity of schools to fulfil these aims was instrumentalised by nation-states during their processes of national literacy and identity formation. However, multinational states face the challenge of constructing compatible national identities – whether nested or dual – in such a way that the various national communities within them consent to being governed by a single state. This compatibility depends in part on whether ethnic–cultural or civic elements predominate, and on how these elements are instrumentalised by political elites at both state and sub-state levels.

2.1. Schooling in the Service of the State

Human beings learn to live in society through a lifelong process of socialisation. Within this process, the stages of primary and secondary socialisation are particularly significant, as they involve the internalisation of values and imaginaries by the individual (Lucas, 1986, p. 370); that is, the process through which individuals form answers to the questions "Who am I?" and "How should I be?" Schooling contributes to fostering a sense of belonging to a community rooted in a specific territory. This sense of belonging is known as national identity – a subtype of social identity (Espinosa and Tapia, 2011, p. 71). It is understood here as a social and cultural construct formed through a process of nationalisation, in which public and private discourses and interactions converge, shaped by various socialising agents (Quiroga, 2013). These agents play a determining role in shaping the individual's sense of membership in the ingroup (i.e. the social group to which they feel they belong and to which they express loyalty). The ingroup is contrasted with the outgroup – the social group to which the individual does not feel they belong and to which they do not express loyalty.

Schooling has been a fundamental pillar in the construction of national identities, to the extent that it is essential for understanding the consolidation of the modern

state. Since the eighteenth and nineteenth centuries, education systems have functioned as key instruments for transmitting values, ideas and conceptions of identity and national belonging (Green, 1990; Hobsbawm, 1992). Compulsory schooling and the teaching of a common language have promoted cultural and linguistic unification, shaping a cohesive citizenry under a shared national identity (Anderson, 1983; Gellner, 1983).

This process has traditionally benefited majority groups within nation-states, enabling them to impose their narrative of national history, culture and identity (Hechter, 2001). Thus, the school curriculum not only transmits technical and scientific knowledge, but also reinforces a national narrative that frequently marginalises or excludes cultural and linguistic minorities. In many cases, education has served as a vehicle for forced assimilation, as seen in the policies of Castilianisation in Spain, Francisation in France or Russification in the Tsarist Empire and the Soviet Union (Fishman, 1972; Smith, 1998).

In multinational and plurinational states with multilevel governance, dominant narratives have been contested, giving rise to debates regarding control of the education system. Educational tensions reflect broader political struggles over the distribution of power and the definition of national identity. In regions with autonomist or secessionist aspirations, sub-state elites have employed education as a means of reinforcing differentiated identities and promoting alternative narratives concerning their history, language and culture (Keating, 2007; Carranza, 2016). Such dynamics are evident in Catalonia and the Basque Country, as well as in Quebec and Scotland, where education systems have been deliberately designed to reinforce distinct national identities and, in some cases, to create distance from the dominant state identity (Conversi, 1997; Wright, 2017).

The contest over educational control carries far-reaching political implications. Central governments seek to maintain unity through a common curriculum, while sub-state governments utilise education to consolidate alternative national projects. This may result in exclusionary forms of belonging and pose a challenge to national cohesion (Tully, 1995; Hargreaves, 2004). However, it is not only communities with aspirations of sovereignty that instrumentalise education. Other regions operating within devolved frameworks also promote regional identities as mechanisms of social cohesion and institutional consolidation (Keating, 2007).

For schooling to function as a tool of identity construction, it requires an administrative apparatus that operates as an ideological transmission chain. Key components of this apparatus include educational legislation, which establishes the regulatory framework and the values to be transmitted (Apple, 2004); the official curriculum, which selects essential content for the formation of the citizenry (Goodson, 2014; Sautereau and Faas, 2023); textbooks, which present specific historical and cultural narratives (Torres Santomé, 2013); and inspection and evaluation bodies, which monitor teaching and learning practices.

Teachers occupy an ambivalent position within this structure. While they represent the final link in the ideological transmission chain, they also interpret and reframe curricular content according to their own experiences and pedagogical beliefs. This interpretive capacity allows for resistance and the rearticulation of the national identity promoted by the state, thereby generating contradictions or departures from the official discourse (Altamirano, 2020). Consequently, the teaching of subjects such as history, literature or civic education may become a site of symbolic contestation, where dominant narratives are reinterpreted or challenged depending on the sociopolitical context and the autonomy of the teacher (Van Dijk, 1997). The education system, therefore, cannot be understood as a monolithic apparatus of ideological reproduction, but rather as a dynamic arena in which elites seek to shape the collective imagination, while alternative resistances and reinterpretations simultaneously emerge.

In this context, our analysis of the discourses of secondary school teachers in Andalusia aims to test the following:

Hypothesis 1: The Andalusian education system fosters a distinct and differentiated Andalusian identity, in a manner consistent with other autonomous communities.

2.2. Identity diversity and legitimacy in multinational states: dual identities

Modern democracies require diffuse legitimacy to maintain stability, grounded in a shared national identity that reinforces the authority of the state without the need for coercion. David Easton (1975) distinguishes between specific legitimacy, which depends on support for particular policies or leaders, and diffuse legitimacy, which is based on sustained trust in institutions and ensures the continuity of the system in times of crisis. National identity thus constitutes a key mechanism for the reproduction of political legitimacy.

In democratic contexts, citizen consent cannot be sustained solely through legal compliance or state efficiency. Voluntary adherence to a democratic order requires a sense of belonging and commitment to a political community that transcends individual or short-term interests (Habermas, 1998). Education plays a central role in this process, acting as a mechanism for the reproduction of political order by naturalising a particular national community and its associated model of legitimacy.

However, in multinational states, the coexistence of multiple national identities complicates the production of uniform legitimacy. The effectiveness of schooling as a state instrument diminishes when it confronts communities with distinct historical and cultural narratives, and the imposition of a singular identity may be perceived as a form of domination (Keating, 2001). The management of such diversity is therefore crucial to ensuring social cohesion and democratic stability.

To sustain their democratic functionality and long-term stability, these states must promote dual or compatible identities, enabling individuals to identify simultaneously with both their national community and the broader state in which

it is embedded (Linz and Stepan, 1996). Compatibility between national and state identities relies on the construction of an inclusive, state-level ingroup that does not compete with pre-existing national identities, but instead incorporates them into a shared framework of belonging (Stepan, 1999).

To achieve this, multinational states must provide institutional recognition of cultural and linguistic diversity. Education is fundamental to this process, as it transmits historical narratives that reflect identity pluralism (Kymlicka, 1995). However, when power is distributed across multiple levels of governance, sub-state elites may seek to promote differentiated national identities to advance political projects aimed at greater autonomy or independence (Keating, 2001). A clear example is Catalonia, where education has been used to reinforce a national identity distinct from the Spanish one (Miley, 2007).

As previously noted, while all autonomous communities in Spain hold competences in the field of education, not all pursue sovereignist goals. In this sense, we argue that the consolidation of legitimacy within such autonomous communities, operating within the framework of devolution, entails the reproduction of dual or compatible identities alongside the Spanish national identity. The development of social cohesion and loyalty towards regional institutions (i.e. the consolidation of autonomous governments as relevant actors within the state) would therefore be compatible with broader national cohesion and a sense of belonging to a state-level ingroup. Given the absence of sovereignist aspirations in Andalusia, we expect our analysis of teacher discourse in Andalusian schools to reveal the following:

Hypothesis 2: The Andalusian identity fostered in schools is constructed as compatible with the Spanish national identity (in other words, Andalusian schooling reproduces dual identities – both Andalusian and Spanish).

The debate surrounding the compatibility of national identities in multinational states is complex. One model that accounts for this compatibility is that of nested identities, in which a subnational identity is embedded within a broader state identity without generating contradiction (Díez Medrano and Gutiérrez, 2001; Máiz, 2004). Another explanatory model is that of salient identities, whereby individuals prioritise different levels of identity depending on the political and geographical context (Moreno, 2004).

In the case of Andalusia, survey-based research suggests that identity compatibility follows the nested identity model: Spanish identity is integrated into the supranational (European) level and encompasses the sub-state (Andalusian) identity (Aguiar and Espinosa, 2011; Coller, 2014; Pérez Yruela, 2014). Both identities share common elements (Palacios, 2008), which facilitates their mutual compatibility.

2.3. Elements Defining National Identity

The education system constitutes a central instrument in the shaping of national identities, although such identities may assume different forms depending on the strategies adopted by political elites. Within this framework, two principal models of national identity are commonly distinguished: the ethnic–cultural model and the civic model. Ethnic–cultural identities are founded on elements such as language, historical heritage and ethnicity, and are based on a primordialist conception of the nation as an organic entity that predates the state. This perspective tends to be static and exclusionary, given its emphasis on historical continuity and the preservation of a supposedly distinctive national essence (Smith, 1998). In the Spanish context, this type of identity has gained particular significance in autonomous communities such as Catalonia and the Basque Country, where cultural and historical uniqueness has been foregrounded in contrast to the Spanish State (Guibernau, 2004).

Civic identities, by contrast, are constructed around shared democratic principles such as legal equality, fundamental rights and citizen participation within a common institutional framework (Habermas, 1998). These identities are not contingent on ethnic or cultural membership, but rather on adherence to an inclusive political project, making them more dynamic and adaptable forms of integration. In plurinational societies such as Spain, the civic model may contribute to democratic stability by enabling the coexistence of multiple collective identities within a single state (Kymlicka, 1995; Keating, 2007). Nonetheless, the Spanish system of regional autonomy, while allowing for some articulation of these identities, has also generated tensions between a shared civic identity and peripheral national identities.

In practice, most states do not exclusively adopt one model, but rather incorporate elements of both, depending on their historical trajectories and political imperatives. In the case of Andalusia, it is proposed that the identity reproduced within the educational sphere assumes a dual character, combining ethnic–cultural and civic components, with a predominance of the latter. This configuration reflects both the inclusive nature highlighted by sociological studies of Andalusian identity and the legitimising function that such identity is expected to perform for the regional government. Based on this dual structure, we formulate our third and final hypothesis:

Hypothesis 3: The Andalusian identity fostered in schools combines ethnic–cultural and civic elements, with a greater emphasis on the civic dimension, reflecting the dual character of Andalusian identity and its intended legitimising role in relation to the regional government.

The authors argue that civic identities are preferable to ethnic–cultural ones, as they allow for the coherent evolution of national identity in line with broader social, political and technological transformations. By contrast, emphasis on ethnic–cultural identity may lead to essentialist and exclusionary conceptions of the nation, which are more susceptible to political instrumentalisation for xenophobic or supremacist ends, thereby undermining inclusion, cooperation and democratic development (García-Segura, 2022).

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3. Research Design

To evaluate the proposed hypotheses, a case study was conducted in secondary schools in the province of Seville. The selection of this province was based on economic and logistical considerations, as well as its comparability with the broader Andalusian context in terms of legislative, organisational and curricular frameworks, given the existence of a common regulatory structure governing all educational institutions in the region.

The study is based on 21 interviews with teachers from 10 educational centres, carried out in 2023. Participation in the interviews was voluntary, and the confidentiality of all data was ensured. Testimonies were transcribed and anonymised prior to analysis, with the approval of the Research Ethics Committee at Pablo de Olavide University (UPO). Cluster sampling was used to select participants, based on a census of 117 schools classified according to their type of ownership (public / state-subsidised private), religious or non-confessional affiliation, and location (rural/urban). Of these 117 schools, 35 were contacted, and 10 agreed to participate.

Despite the reduction in sample size, the diversity of institutional types included in the study was preserved. A total of 21 teachers were interviewed. Their distribution by gender and by type of school is presented in Tables 1 and 2, with further details available in Annex 1.

Table 1

Characteristics of the theoretical and empirical sample of secondary schools in the province of Seville. Percentages calculated with respect to the total number of schools in the census (N = 171) and the theoretical sample (N = 35)

Dimension	Type	Universe size: N	Theoretical sample (of N)	Empirical sample (of n)
Ownership	Public State-subsidised private		26 (75%) 9 (25%)	6 (60%) 4 (40%)
Context	Rural Urban		5 (14%) 30 (86%)	2 (20%) 8 (80%)
Affiliation	Religious Non-confessional		8 (22%) 27 (78%)	3 (30%) 7 (70%)
Total		171	20% (35/171)	30% (10/35)

N = universe size (171 schools).
n = theoretical sample size (35 schools).
Source: compiled by the authors based on the analysis of 21 interviews with secondary school teachers in the province of Seville.

Table 2

Characteristics of the empirical sample of teachers by school type and gender. Percentages calculated with respect to the total number of interviewees (N = 21)

Dimension	Type	Men percentage (n)	Women percentage (n)	Total
Ownership	Public State-subsidised private	5 (56%) 4 (44%)	10 (83%) 2 (17%)	15 (71%) 6 (29%)
Context	Rural Urban	2 (22%) 7 (78%)	0 (0%) 12 (100%)	2 (8%) 19 (92%)
Affiliation	Religious Non-confessional	4 (44%) 5 (56%)	1 (8%) 11 (92%)	5 (23%) 16 (77%)
Total		9 (43%)	12 (57%)	21 (100%)

Source: compiled by the authors based on the analysis of 21 interviews with secondary school teachers in the province of Seville.

A semi-structured interview guide was administered to the participating teachers. The interview began with questions concerning activities carried out in relation to dates of explicitly civic significance: Andalusia Day (28 February) and Flag Day (4 December)[3], the latter having been recently incorporated into the official school calendar. Following this descriptive phase, teachers were invited to share their subjective experiences, describing additional classroom activities and their connection to Andalusian identity, as well as proposing initiatives they considered necessary. At no point did the interview guide suggest a distinction between civic and ethnic–cultural elements.

The objective was to gather information on both the content and activities implemented and the teachers' perceptions of them. The interview concluded with reflections on the teaching of Andalusia within compulsory secondary education, including assessments of textbooks, the official curriculum and comparisons with educational experiences outside Andalusia.

A mixed-methods approach was adopted for data analysis, combining a typological classification of activities related to Andalusian identity using ATLAS.ti 25 with a discourse analysis of teacher responses. The complete coding manual, including all analytical categories, is provided in Annex 2.

4. Typological organisation of activities carried out in Andalusian educational centres

Our initial approach to the data involved an inductive classification of the activities described by teachers into 16 dimensions related to the reproduction of Andalusian identity. These dimensions group together activities with similar content (see Table 3), and more detailed definitions are provided in Annex 2.

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The diversity of activities reflected in Table 3 reveals a combination of ethnic–cultural and civic elements, providing preliminary support for our hypotheses. With regard to Hypothesis 1, teachers report specific activities aimed at fostering Andalusian identity. In relation to Hypothesis 3, the activities encompass both civic and ethnic–cultural components.

Table 3

Items mentioned by teachers as involving activities related to the reproduction of Andalusian identity

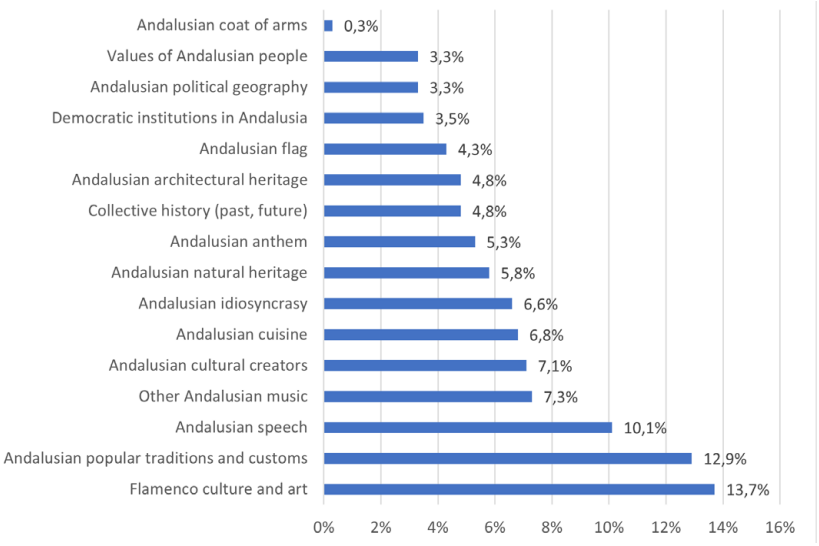
Item/code	Definition
Andalusian flag	Content and activities related to the Andalusian flag. Example: raising the flag.
Flamenco culture and art	Content and activities related to flamenco. Example: celebrating Flamenco Day.
Andalusian coat of arms	Content and activities related to the Andalusian coat of arms. Example: drawing the coat of arms.
Andalusian cuisine	Content and activities related to Andalusian cuisine. Example: comparing Andalusian and English cuisine.
Andalusian political geography	Content and activities related to the political geography of Andalusia. Example: explaining territorial administrations in Andalusia.
Andalusian anthem	Content and activities related to the Andalusian anthem. Example: singing or playing the anthem.
Collective history (past, future)	Content and activities related to the history of Andalusia. Example: explaining the process of gaining autonomy.
Andalusian idiosyncrasy	Content and activities related to the perceived characteristics of Andalusians. Example: describing the cheerful nature of Andalusian people.
Democratic institutions in Andalusia: - Parliament - Regional Government of Andalusia - Municipal councils	Content and activities related to or conducted in collaboration with Andalusian democratic institutions. Example: visiting the Andalusian Parliament.
Andalusian speech[4]	Content and activities related to Andalusian speech. Example: explaining the characteristics of Andalusian speech.
Other Andalusian music (non-flamenco)	Content and activities related to other Andalusian music. Example: singing Christmas carols.
Andalusian architectural heritage	Content and activities related to Andalusian architectural heritage. Example: visiting cathedrals.
Andalusian natural heritage	Content and activities related to Andalusian natural heritage. Example: excursion to Doñana National Park.
Andalusian cultural creators	Content and activities related to Andalusian cultural creators. Example: reciting poems by Lorca.
Andalusian popular traditions and customs: - Religious - Social - Gastronomic - Craft-based	Content and activities related to Andalusian popular traditions and customs. Example: hosting a traditional recipe competition.
Values of the Andalusian people: - Solidarity - Tolerance - Integration/inclusion	Content and activities related to values associated with Andalusian identity. Example: organising a charity lunch.

Source: compiled by the authors based on the analysis of 21 interviews with secondary school teachers in the province of Seville.

However, Figure 1 qualifies these findings by highlighting the limited presence of civic elements in the construction of Andalusian identity. Items such as the Andalusian coat of arms or democratic institutions are rarely mentioned among the activities reported by teachers. Although the flag and the anthem are somewhat more visible, their overall weight within the total set of recorded activities remains marginal. This absence of civic content is particularly noteworthy given that the interviews began with questions about two commemorative events of clear civic and political significance: Andalusia Day and Andalusian Flag Day. The latter, in particular, lacks educational traction, with many schools opting not to commemorate it ("We don't celebrate Flag Day. It goes completely unnoticed", I5).

Figure 1

Relative importance, in the teachers' discourse, of the 16 items around which activities related to Andalusian identity are organised: percentages based on normalised frequencies



Source: compiled by the authors based on the analysis of 21 interviews with secondary school teachers in the province of Seville.

The weak presence of civic elements in representations of Andalusian identity may constrain its dynamism and modernity, keeping the focus on the past rather than the future. Moreover, it may hinder the development of diffuse loyalty towards the regional government. Given the relevance of this issue, we analysed the prominence of civic elements according to school characteristics and the gender of the teachers interviewed (see Figures A1 to A4 in Annex 1).

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Regarding school ownership, democratic institutions feature more prominently in public schools. In terms of religious affiliation, non-confessional schools attach greater importance to civic activities than religious ones – particularly those related to democratic institutions, political geography and the flag. At the territorial level, rural schools prioritise activities involving the anthem and the flag, whereas urban schools focus more on political geography and democratic institutions. With respect to gender, male teachers more frequently mention activities related to democratic institutions and the flag, although no significant gender differences are observed for other civic elements.

At the lower end of Figure 1 appear ethnic–cultural activities such as flamenco culture and art, popular traditions and Andalusian speech, which together account for more than one-third of the activities mentioned. These three elements form an ethnic–cultural core that predominates in the reproduction of Andalusian identity in schools. This approach mirrors that adopted in other autonomous communities such as Catalonia and the Basque Country, which have integrated their distinct cultural identities into their education systems (Doncel, 2008).

The prominence of these ethnic–cultural elements varies by type of school. Activities related to Andalusian speech are more frequent in public, non-confessional and rural schools, while popular traditions and customs are mainly promoted in private and religious schools. With regard to flamenco, its importance appears relatively consistent across school types, although more activities related to it are reported in urban schools. Furthermore, female teachers are more likely to mention activities focused on these three elements (see Figures A1 to A4 in Annex 1).

In the mid-range of Figure 1 are other ethnic–cultural elements with intermediate visibility. Gastronomy and non-flamenco Andalusian music are generally associated with celebrations and festivities such as Carnival, Holy Week, the Spring Fair or Christmas, often expressed through marches, carols or popular ***copla*** songs. In relation to idiosyncrasy, references include conviviality and a cheerful approach to life, reinforcing the ideal of the Andalusian ***vida buena*** (good life) (Pérez Yruela, 2014) and constructing contrasts between "us, the Andalusians" and "the others". Finally, the cultural creators category includes emblematic figures of Andalusian culture such as Lorca, Camarón de la Isla and Bécquer.

In conclusion, this initial analysis confirms that teachers identify a broad and diverse set of activities related to the reproduction of Andalusian identity in schools, lending support to Hypothesis 1. It also shows a strong emphasis on ethnic–cultural elements similar to those promoted in other autonomous communities with pronounced national identities. However, the evidence in support of Hypothesis 3 – which anticipated a stronger role for civic elements in the construction of a dual Andalusian identity – is not substantiated. Civic elements are markedly underrepresented in comparison to their ethnic–cultural counterparts.

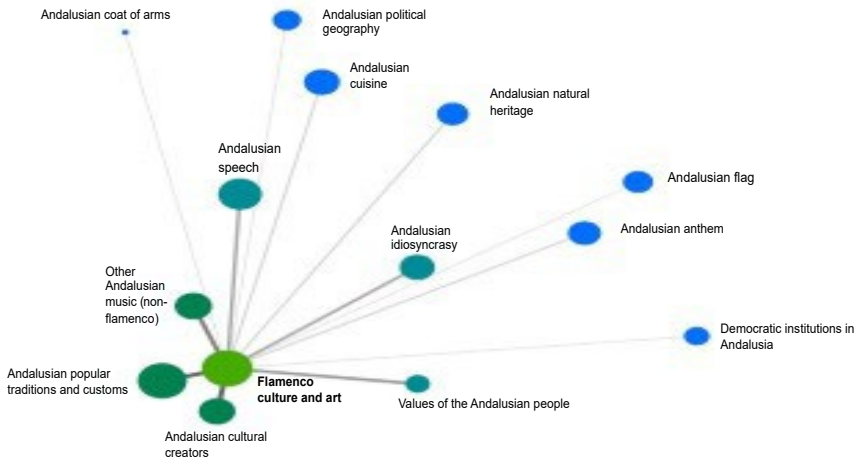
To evaluate the extent to which the Andalusian identity constructed in schools can be considered inclusive (Hypothesis 2), it is necessary to analyse more closely how teachers interpret and assign meaning to ethnic–cultural elements. As previously noted, ethnic–cultural identity tends to anchor belonging in the past, focusing on the origin of the community rather than its future trajectory. This emphasis may lead to static and closed conceptions of national identity, which in certain cases may justify the exclusion of those who do not share the same background.

4.1. The Ethnic–Cultural Core of Andalusian Identity

Figure 2 illustrates the co-occurrence of items around which the interviewed teachers organise activities related to the reproduction of Andalusian identity. The size of each circle is proportional to the frequency with which the corresponding item appears in the discourse, while the lines connecting them represent the frequency with which different items are mentioned together (the thicker and shorter the line, the greater the co-occurrence between the elements represented). In this regard, Figure 2 shows that the majority of activities described by teachers as contributing to the reproduction of Andalusian identity are structured around a central core focused on flamenco culture and art – by far the most frequently referenced element.

Figure 2

Co-occurrence of ethnic–cultural elements of Andalusian identity in the teachers' discourse



Source: compiled by the authors based on the analysis of 21 interviews with secondary school teachers in the province of Seville.

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This element acts as the axis around which a cultural Andalusian ingroup is constructed, defined in opposition to outgroups represented by other autonomous communities. Unlike other historic communities with sovereignist aspirations – where the outgroup is typically the broader Spanish population – in the case of Andalusia, this specific element (flamenco culture and art) is often projected as a component of Spanish national identity (that is, as a trait shared with a higher-level outgroup, the Spanish nation).

> Flamenco is flamenco. And then you have the Catalans – how are you going to export the sardana? The sardana just doesn't have the same appeal, and that's the proof. Just like they export Rosalía, we export flamenco (I13).

This projection of flamenco as a national symbol raises the question of whether it reflects a nested identity structure or rather a lack of differentiation between Andalusian and Spanish identity.

In addition to flamenco, references to enduring traditions and customs passed down through generations are also central to the activities teachers associate with the formation of Andalusian identity. As illustrated in Figure 2, these traditions and customs are not only linked to flamenco but also to other forms of Andalusian music, particularly in connection with celebrations such as Holy Week or the singing of carols at Christmas.[5] As with flamenco culture, there appears to be a degree of indistinction between these elements as components of Andalusian identity and their projection within broader Spanish identity. Since these practices (including other popular traditions such as the Spring Fair or bullfighting) are commonly associated with Spanish national identity, they may not serve to clearly differentiate Andalusian identity from that of the rest of Spain.

It is important to highlight the significance of religious traditions, both in religious schools – where activities such as processions are organised ("on the Friday of Sorrows we organise a procession", I20) – and in non-confessional schools, which include activities such as "visiting brother- and sisterhoods" (I12), nativity scenes or the performance of religious music. In this respect, the prominence of Catholic traditions, although not explicitly coded under this label, appears to play a substantial role in shaping Andalusian identity.

Undoubtedly, however, references to activities organised around Andalusian speech provide the clearest indication that Andalusia reproduces the nation-building practices found in other autonomous communities. Despite not having a language of its own, the Andalusian linguistic variety acquires notable prominence in the transmission of identity by teaching staff. Andalusian speech is framed as a representative feature of the region and an expression of its identity – either by emphasising the linguistic distinctiveness of Andalusia in relation to other autonomous communities, or by rejecting prejudices against it and asserting its equal value.

Speech is understood not merely as a communicative tool but as a marker of community identity, alongside culture and traditions. Teachers assert pride in Andalusian speech and stress the importance of public figures such as Alejandro Sanz, Manuel Carrasco or María Jesús Montero speaking in Andalusian without inhibition as evidence that it is as legitimate as other linguistic forms in Spain:

> Now we can see political representatives and other public figures speak Andalusian without holding back. It's finally happening! There's a minister, for instance, who is Andalusian and speaks Andalusian fluently and confidently, without trying to water it down. So that's it. We shouldn't be repressing ourselves – on the contrary (I3).

Unlike the two previous elements, the defence of Andalusian speech is articulated as a claim to pride, rejecting stereotypes, prejudices and clichés. The distinction between Andalusian speech and that of other regions is affirmed, and belonging to Andalusia is constructed through this difference in speech, often accompanied by references to perceived mistreatment and stigmatisation by other communities, as well as calls to overcome an inferiority complex and assert parity with other regions.

> There shouldn't be those comments like "you speak badly". No. You don't speak badly – you speak differently from other regions in Spain, but that doesn't mean some ways of speaking are better or worse. They're simply different. That's all there is to it (I7).

Andalusian speech is the only element in the cultural core previously discussed that is not projected onto Spanish national identity, instead remaining a distinctly Andalusian marker. Even so, it does not create an Andalusian ingroup in opposition to a Spanish outgroup, but rather defines outgroups in relation to other autonomous communities, with interviewed teachers calling for the elimination of stereotypes and prejudices about Andalusian speech. This contrast is particularly striking when compared to flamenco and popular traditions – elements that are also part of Spanish national identity, yet are not accompanied by the same sense of stigma. This distinction is reflected in assertions such as "we don't speak bad Spanish, but perfect Andalusian" (I12):

> I've always said it – it's as if 'Andalusian' has always meant uneducated. Are you Andalusian? Then you're a bumpkin. Well, analysing the features of Andalusian speech and seeing them as valid – just like ***laísmo*** in Madrid isn't seen as problematic – means valuing ourselves, doesn't it? We should embrace these features of ours. They're nothing to be ashamed of – quite the opposite (I3).

In short, the only clearly Andalusian element that is not assimilated into Spanish national identity gives rise to an ingroup marked by a sense of grievance, which constructs its identity in response to perceived unjust treatment by other autonomous communities. With respect to Hypothesis 2, regarding the degree of

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inclusiveness of Andalusian identity, our evidence clearly indicates that Andalusian and Spanish identities are compatible. That is, no Spanish outgroup is constructed against which the interviewed teachers position a differentiated Andalusian ingroup based on ethnic–cultural traits. Nevertheless, it is problematic that the core of these traits does not support a clearly defined distinction between Andalusians and other Spaniards, given that the main differentiating element – speech – is framed as a negatively coded marker, tied to a sense of grievance in relation to other autonomous communities.

5. Conclusions. Problematising Andalusian Identity

This study has provided insight into the construction of Andalusian identity in educational settings and its relationship with Spanish national identity. By analysing both the activities implemented in schools and the discourse of teaching staff, the research has made it possible to assess the proposed hypotheses and identify the key challenges involved in fostering Andalusian identity within the classroom.

The findings offer partial support for Hypothesis 1, which suggested that the Andalusian education system fosters a distinct and differentiated identity. Teachers were found to carry out a wide variety of activities aimed at transmitting elements of Andalusian identity, with a marked emphasis on ethnic–cultural aspects. However, the evidence does not support Hypothesis 3, as civic components were found to play a marginal role in the construction of Andalusian identity. Elements such as the Andalusian coat of arms, regional democratic institutions or political geography receive far less attention than more traditional themes such as flamenco culture, Andalusian speech and popular festivities (particularly those of Catholic origin). This absence of civic content may limit the development of a more forward-looking and dynamic sense of Andalusian identity.

In relation to Hypothesis 2, which posited the construction of a dual identity compatible with Spanish national identity, the results show no structural opposition between the two. On the contrary, Andalusian identity is largely presented as continuous with Spanish identity across the majority of dimensions analysed. Nonetheless, a key challenge emerges: Andalusian speech is the only characteristic that teachers consistently associate with a clear distinction from other autonomous communities, and it is framed through a perceived grievance – reinforcing a narrative of inferiority in comparison with other regions of Spain.

The main obstacle to reproducing Andalusian identity in schools is the predominance of ethnic–cultural elements over civic ones. This imbalance tends to anchor identity in the past and does not contribute to the construction of a more inclusive identity rooted in democratic values and civic engagement. The limited presence of civic education risks fostering a weaker sense of commitment to regional institutions and may hinder the development of diffuse loyalty to the Andalusian government.

Ultimately, an Andalusian identity lacking strong civic foundations may also lack the dynamism needed to confront the socio-economic challenges that continue to place Andalusia at the lower end of national rankings. As such, the region risks remaining caught in the so-called "paradox of satisfaction" (Navarro and Pérez Yruela, 2000) – rooted in the celebration of "the good life" and the cultural values associated with it, but lacking the vision or incentive to imagine a better future capable of mobilising nationalising efforts. As one interviewee put it:

> To feel Andalusian – not just because of the way we talk, not just because of the culture, not just because of that olive-tree landscape, and so on – but also because every region, every community, ought to have a kind of territorial class consciousness, precisely to address the socio-economic divides that exist between territories (I6).

Another issue identified is the lack of a clearly defined positive differentiation between Andalusian and Spanish identity. Whereas flamenco culture, festivals and gastronomy are presented as elements shared with Spanish identity, Andalusian speech emerges as the only distinctive feature – although it is associated with perceptions of marginalisation and lack of recognition. This may give rise to an Andalusian identity articulated not proactively but rather as a response to an alleged external devaluation.

It is important to highlight the key role played by teachers in reproducing Andalusian identity, as they act as mediators between the official curriculum and classroom practice. Their discourse and teaching practices determine which aspects of identity are emphasised and how these are conveyed to students. As observed, teachers predominantly reproduce an Andalusian identity grounded in cultural and traditional elements, reinforcing an essentialist vision of identity. At the same time, a certain degree of professional agency allows for reinterpretations and adjustments depending on the context of the school and the personal experiences of the teaching staff.

The type of school also has a significant influence. In public and non-confessional schools, there are more references to civic elements, while in state-subsidised private and religious schools, activities related to traditions and customs predominate. Furthermore, female teachers have placed greater emphasis on ethnic–cultural aspects, suggesting that personal experience and pedagogical beliefs influence how Andalusian identity is reproduced in educational settings.

In conclusion, while Andalusian schools act as spaces for fostering regional identity, they do so in an unbalanced manner, prioritising cultural over civic dimensions. To promote a more inclusive and forward-looking identity, it would be advisable to reinforce the teaching of democratic values and regional institutions, and to foster a more positive and proactive vision of Andalusian identity – one that does not rest primarily on perceived linguistic grievances vis-à-vis other regions.

However, these conclusions should be regarded as provisional, due to the limitations of the sample and the need for further research into other aspects of the education system. Some of the study's limitations concern its restriction to the province of Seville, the limited number of schools analysed (without considering other classification criteria such as geographical location or socio-economic profile), the relatively small number of interviews and the limited socio-demographic information gathered on participants (future studies could incorporate variables such as age or political orientation). Future research will address these limitations by conducting further interviews across other provinces. This study constitutes the first article of an ongoing doctoral thesis on the teaching of Andalusia in secondary education, presenting initial findings and contributions regarding the transmission of Andalusian identity in the classroom. It is hoped that these results, together with ongoing research on curriculum content and textbook representation, will provide a foundation for developing recommendations to support the balanced construction of Andalusian identity in schools.

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Notes

1 Conceptualisation, research, data curation, formal analysis, writing – original and final draft – review and editing.

2 Conceptualisation, supervision, methodology, funding acquisition, writing (review and editing).

3 The Andalusian autonomy process had two key milestones. The first was the demonstration on 4 December 1977, in which two million Andalusians peacefully demanded autonomy – a day marked by the assassination of Manuel José García Caparrós. The second was the referendum held on 28 February 1980, which saw a majority vote in favour of autonomy, despite opposition from the UCD government. While 28 February became established as Andalusia Day, 4 December was officially recognised as Flag Day in 2021.

4 There is a complex debate surrounding the linguistic reality of Andalusia, with various terms used to refer to it, such as accent, dialect, Spanish spoken in Andalusia, Andalusian speech varieties or Andalusian linguistic modality. For the purposes of coding, we have chosen the term "Andalusian speech", though the different expressions are used interchangeably throughout the text.

5 It is worth noting the greater prominence of this item in private and religious schools.

Annex 1

Table A1

Description of the characteristics of cases in the empirical sample

ID	Gender	Ownership	Affiliation	Area	Subject	Role
1	M	P	N	Ru	Music	Tea.
2	W	P	N	U	English	Head T.
3	W	P	N	U	Special needs	Tea.
4	W	P	N	U	Music	Tea.
5	M	P	N	U	Extracurricular	Head of S.
6	M	P	N	U	Social sciences.	Tea.
7	W	P	N	U	English	Tea.
8	W	P	N	U	Mathematics	Tea.
9	W	P	N	U	Language	Tea.
10	W	P	N	U	Creative science	Tea.
11	W	P	N	U	Language	Tea.
12	W	P	N	U	Language	Tea.
13	W	P	N	U	Social sciences	Tea.
14	W	S	N	U	Head of S.	Head of S.
15	M	S	R	U	Music and social sciences	Tea.
16	M	S	R	U	Biology	Tea.
17	M	S	R	U	Music and flamenco	Tea.
18	M	P	N	Ru	Language	Head T.
19	M	P	N	U	Physics and chemistry	Tea.
20	M	S	R	U	Physical education	Tea.
21	M	S	R	U	Biology	Tea.

ID: Interview identifier.
M: Man; W: Woman.
P: Public; S: State-subsidised private.
N: Non-confessional; R: Religious.
U: Urban; Ru: Rural.
Tea.: Teacher; Head T.: Head Teacher; Head of S.: Head of Studies.

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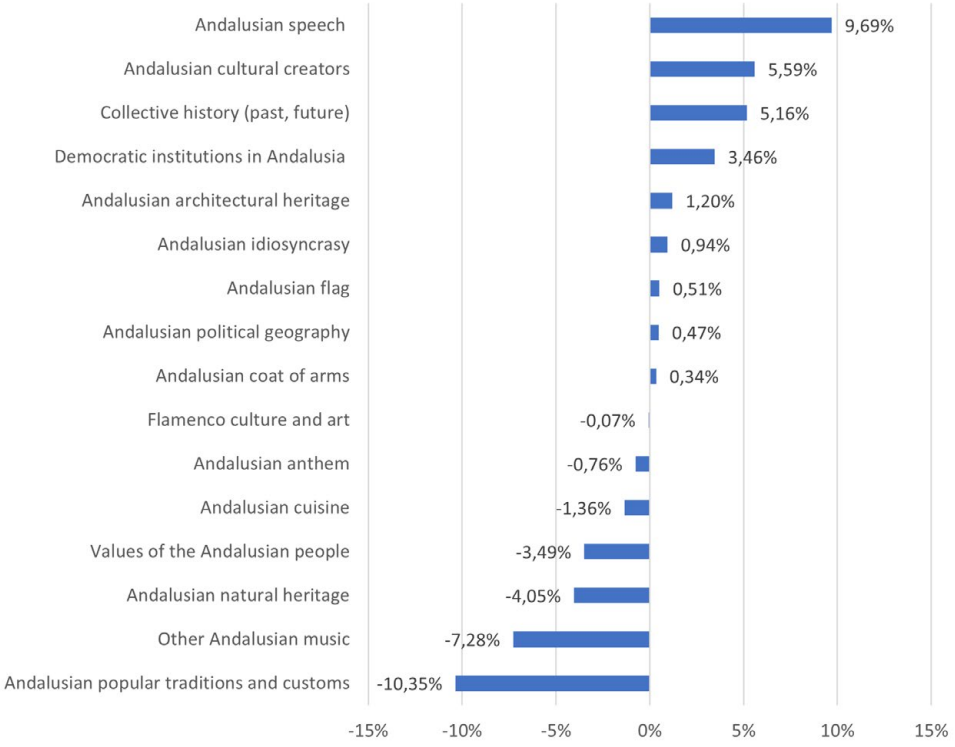
Figure A1

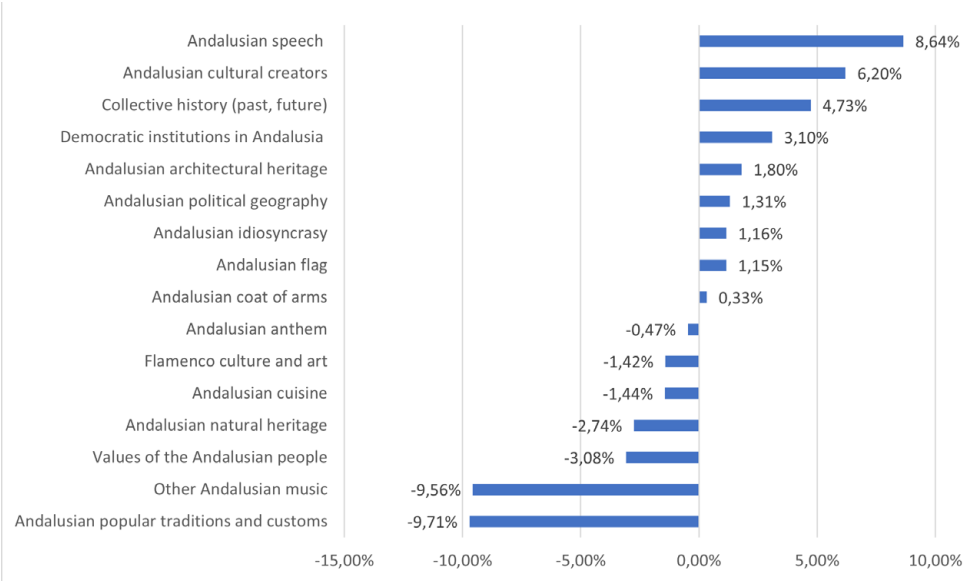
Net difference in favour of public versus private school teachers in terms of the frequency with which they mention activities related to the reproduction of Andalusian identity



Source: compiled by the authors based on the analysis of 21 interviews with secondary school teachers in the province of Seville. The net difference has been calculated based on percentages derived from normalised frequencies.

Figure A2

Net difference in favour of teachers from non-confessional versus religious schools in terms of the frequency with which they mention activities related to the reproduction of Andalusian identity



Source: compiled by the authors based on the analysis of 21 interviews with secondary school teachers in the province of Seville. The net difference has been calculated based on percentages derived from normalised frequencies.

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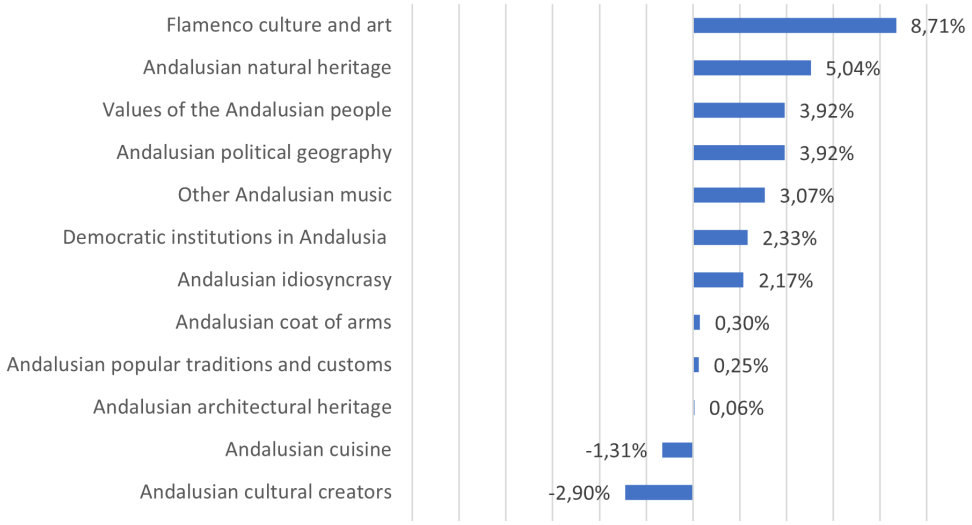
Figure A3

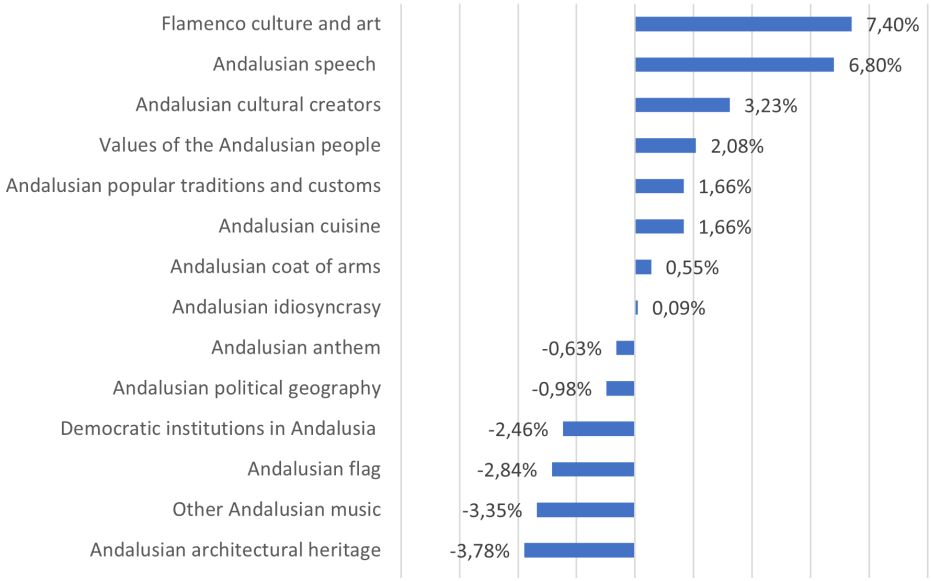
Net difference in favour of teachers from urban versus rural schools in terms of the frequency with which they mention activities related to the reproduction of Andalusian identity



Source: compiled by the authors based on the analysis of 21 interviews with secondary school teachers in the province of Seville. The net difference has been calculated based on percentages derived from normalised frequencies.

Figure A4

Net difference in favour of female versus male teachers in terms of the frequency with which they mention activities related to the reproduction of Andalusian identity



Source: compiled by the authors based on the analysis of 21 interviews with secondary school teachers in the province of Seville. The net difference has been calculated based on percentages derived from normalised frequencies.

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Annex 2

1. Content of the discourse

This category refers to the "object" around which the interviewee's discourse is organised. It may relate to opinions, preferences, complaints or demands expressed by the interviewee. It may also refer to any type of activity carried out by the school with potential "Andalusian nation-building" content – whether or not it involves other institutions and regardless of the format of the activity. This section includes references related to various typologies used to define national identity and nationalism: ethnic, cultural, civic and symbolic elements on the one hand, and ascribed and acquired characteristics on the other. However, the object referred to here need not be the central or principal focus of the activity. It may be one element of the content, provided it is sufficiently substantial and is explicitly identified as "Andalusian".

1.1. Andalusian idiosyncrasy

This code captures interviewees' references to any type of activity focused on the idiosyncrasy of the Andalusian people, including both curricular and extracurricular activities. These activities may be formal or informal. Here, the concept of idiosyncrasy is akin to "ethnicity". Ethnicity itself is not expected to appear explicitly, but activities related to features perceived as inherent and unique to Andalusians as a people are classified here. These may include physical or character traits identified as distinctive or exclusive (or nearly exclusive) to Andalusians. The key to identifying what is considered idiosyncratic lies in the interviewee's belief that such features cannot be "learnt" or "acquired" – one either has them or does not. This can be summed up by the idea that "one is born Andalusian, not made". In general, this subcategory may also include stereotypes about Andalusians that interviewees share (including with students). For example: the ***malafollá*** ("moodiness") of people from Granada, the ***salero*** ("magnetism") of people from Cádiz, statements such as Andalusians having historically been courageous and bold, or alternatively conservative and backward, and comments linked to the notion of the ***vida buena*** ("good life"). Not coded, for example: mentions of other groups unless they are explicitly linked to Andalusia.

1.2. Collective history (past, future)

This code captures interviewees' references to any activity related to the collective history of Andalusia, whether curricular or extracurricular. These activities may be formal or informal. In the activities, Andalusia may be referred to as a region, nation, territory, people or community. What this code seeks to capture is whether the activity places value on Andalusia's historical existence and continuity over time and/or on its projection into the future. Only collective references are included here – whether to the territory and its institutions, or to collective feats

or accomplishments by Andalusians as a people. For example: the organisation of world exhibitions, the achievement of autonomy, "the Arab conquest". Not coded, for example: references to individual accomplishments or creations by historical figures of Andalusian origin. These are covered under the code Andalusian cultural creators.

1.3. Democratic institutions in Andalusia

This code captures interviewees' references to activities related to the democratic institutions of Andalusia, including both curricular and extracurricular activities. These activities may be formal or informal. In general, they must reference institutions belonging to the Andalusian community, such as the Andalusian Parliament, the regional government or the High Court of Justice of Andalusia. Municipal councils are covered under a separate subcategory. This category is not coded directly, but through specific subcodes created for each institution. For example: visiting the Andalusian Parliament or the Regional Government of Andalusia, explaining the origins of these institutions, etc.

Democratic institutions in Andalusia: Municipal Councils

This subcode is used for activities related to municipal councils in Andalusia, whether curricular or extracurricular. Activities may be formal or informal. In general, they must refer to the local municipal council or to the concept of the municipal council more broadly. For example: visits from the mayor or councillors, participation in educational activities about the municipal council or its competences, etc.

Democratic institutions in Andalusia: Regional Government of Andalusia/Junta de Andalucía

This subcode is used for activities related to the Regional Government of Andalusia or Junta de Andalucía (understood as the executive branch of the region), whether curricular or extracurricular. Activities may be formal or informal. In general, references must concern the regional government of Andalusia, the Council of Government of the Junta de Andalucía, or the Presidency of the regional government. For example: visits from regional ministers, visits to the Palace of San Telmo, classroom activities about the competences of the Andalusian government, etc.

Democratic institutions in Andalusia: Parliament

This subcode is used for activities related to the Andalusian Parliament, both curricular and extracurricular. Activities may be formal or informal. In general, they must involve references to the Andalusian Parliament – whether its history, origins or current members. For example: visiting the Andalusian Parliament, visits from a member of parliament to the school, classroom activities related to the powers and functions of the Andalusian Parliament, etc.

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1.4. Values of the Andalusian people

This code captures interviewees' references to any activities focusing on values regarded as characteristic of the Andalusian people, including both curricular and extracurricular formats. This code contrasts with that of Andalusian idiosyncrasy. Unlike the latter, it refers specifically to the character traits of Andalusians, highlighting shared collective values, usually presented in a positive light. These activities may be formal or informal. The key feature is that the interviewee considers these values to be teachable, that they are in fact taught in school, and that they are actively shared with students. This is linked to the idea that "a good Andalusian is made". The values highlighted here are those that interviewees attempt to promote in school settings as part of constructing this ideal. This category is not coded directly, but through specific subcodes for each value. For example: promotion of values such as tolerance, inclusion and a sense of belonging to an open community. Not coded, for example: mentions of Andalusia's past.

Values of the Andalusian people: Solidarity

This subcode is used for activities intended to foster solidarity, both curricular and extracurricular. Activities may be formal or informal. In general, the activities must promote values related to solidarity among students. For example: food drives, toy donations, fundraising, etc.

Values of the Andalusian people: Capacity for integration/inclusion

This subcode is used for activities that aim to foster integration and inclusion, whether curricular or extracurricular. Activities may be formal or informal. In general, references must concern the promotion of values related to inclusion and integration among the student body. For example: welcoming refugees or migrants, volunteer activities focused on immigration, etc.

Values of the Andalusian people: Tolerance

This subcode is used for activities that seek to foster tolerance among students, both curricular and extracurricular. Activities may be formal or informal. In general, they must aim to promote values associated with tolerance within the school context. For example: activities against hate speech or hate-motivated violence, etc.

1.5. Andalusian coat of arms

This code captures interviewees' references to any type of activity related to the coat of arms of Andalusia, including both curricular and extracurricular activities. These activities may be formal or informal. In general, this category includes activities related to the Andalusian coat of arms, whether theoretical or practical. For example: explanations of its shape, colours, meaning and historical origin; classroom activities or fieldwork centred on the coat of arms, etc. Not coded, for example: activities related to the Spanish coat of arms or municipal councils.

1.6. Andalusian flag

This code captures interviewees' references to any type of activity related to the flag of Andalusia, including both curricular and extracurricular activities. These activities may be formal or informal. In general, this category includes activities related to the Andalusian flag, whether theoretical or practical. Mentions of Flag Day (***Día de la Bandera***) are also included. For example: flag-raising ceremonies; explanations of its shape, colours, meaning and historical origin; classroom activities or fieldwork centred on the flag, etc. Not coded, for example: activities related to the Spanish flag.

1.7. Andalusian cuisine

This code captures interviewees' references to any type of activity related to Andalusian gastronomy (or containing a gastronomic component), including both curricular and extracurricular activities. These activities may be formal or informal. In general terms, this category applies whenever food is eaten, drunk or prepared on the premises (or when an activity involving cooking is assigned), and the gastronomic element is identified as distinctly Andalusian. This may relate to the type of food or drink, but also to the manner of consumption, with whom food is shared or the time at which it is eaten. The emphasis lies on highlighting what is particular to Andalusian culture – that is, what differentiates it. For example: a visit to a Michelin-starred restaurant with an Andalusian chef. Not coded, for example: activities related to Andalusian raw materials or ingredients.

1.8. Andalusian cultural creators

This code captures interviewees' references to any type of activity related to cultural creators (historical or contemporary) from Andalusia, including both curricular and extracurricular activities. These activities may be formal or informal. In general, they must place value on the contribution of relevant figures within Andalusian culture. This may refer to any discipline, including music, literature, architecture, painting, cinema or theatre. For example: references to Lorca, Camarón de la Isla or other prominent figures; research activities on cultural creators; the preparation of biographies or exhibitions. Not coded, for example: references to Blas Infante linked to his role in the construction of Andalusian autonomy (these fall under collective history). The mere mention of an Andalusian creator (cultural figure), even if not the central focus of the activity, is coded. This applies when the figure is mentioned as part of or as an illustration of another topic.

1.9. Andalusian architectural heritage

This code captures interviewees' references to any type of activity related to Andalusian architectural heritage, including both curricular and extracurricular activities. These may be formal or informal activities. In general, they should highlight the richness, diversity and distinctiveness of Andalusian architecture in

comparison with the rest of Spain. The focus may be on buildings or monuments themselves, architectural styles and/or Andalusian creators. For example: learning about iconic buildings or monuments in Andalusia or its provinces, the "Andalusian architectural style", white villages, guided tours, etc. Not coded, for example: activities related to Andalusia's natural heritage.

1.10. Andalusian language and speech

This code captures interviewees' references to any type of activity related to the language or speech patterns of Andalusia, including both curricular and extracurricular activities. These may be formal or informal activities. In general, this includes references to features that characterise Andalusian speech, describing Andalusian as a dialect (or not), identifying variants of the dialect, or commenting on what constitutes correct or incorrect speech. For example: stating that Andalusian speech is not incorrect Spanish but a dialect with its own distinctive features, which may be addressed in educational activities. Not coded, for example: references to other languages not connected with Andalusian speech.

1.11. Andalusian anthem

This code captures interviewees' references to any type of activity related to the anthem of Andalusia, including both curricular and extracurricular activities. These activities may be formal or informal. In general, this includes activities involving the Andalusian anthem, whether theoretical or practical. For example: listening to the anthem at school, playing or singing it, learning to perform it, explaining its meaning, etc. Not coded, for example: activities related to the Spanish national anthem.

1.12. Andalusian popular traditions and customs

This code captures interviewees' references to any type of activity related to the knowledge or recovery of Andalusian popular traditions and customs, including both curricular and extracurricular activities. These activities may be formal or informal. In general, they refer to Andalusian traditions and customs across various domains. This category is not used for coding directly; instead, the relevant subcodes for specific traditions are applied. For example: learning about traditional games, historical trades, visiting ethnographic museums, etc. Not coded, for example: mentions of historical events.

Andalusian popular traditions and customs: Craft-based

This subcode captures interviewees' references to any type of activity related to Andalusian craft traditions, including both curricular and extracurricular activities. In general, it includes all activities organised by or involving the school (on or off the premises). In addition to focusing on a craft-based activity, the Andalusian dimension of the tradition must be explicitly mentioned (e.g. unique to Andalusia

or practised with specifically Andalusian features). For example: making objects with local materials or learning Andalusian ceramic techniques. Not coded, for example: making wicker baskets.

Andalusian popular traditions and customs: Gastronomic

This subcode captures interviewees' references to any type of activity related to Andalusian gastronomic traditions, including both curricular and extracurricular activities. This code is compatible with "Andalusian cuisine". In general, it covers all school-organised or school-involved activities (on or off the premises) focused on learning about or recovering elements of typical Andalusian cuisine. For example: preparing traditional recipes, attending workshops on Andalusian gastronomy, etc.

Andalusian popular traditions and customs: Religious

This subcode captures interviewees' references to any type of activity related to Andalusian religious traditions, including both curricular and extracurricular activities. In general, it includes all activities organised by or involving the school (on or off the premises). The activity must have a religious component and refer explicitly to the Andalusian dimension of the tradition (e.g. being unique to Andalusia or expressed in a culturally specific way). For example: learning about traditional pilgrimages such as El Rocío, or the celebration and features of Andalusian Holy Week, including traditional foods specific to the occasion.

Andalusian popular traditions and customs: Social

This subcode captures interviewees' references to any type of activity related to Andalusian social traditions, including both curricular and extracurricular activities. In general, it includes all activities organised by or involving the school (on or off the premises). In addition to being centred on a social practice, the activity must refer to its specifically Andalusian nature (e.g. being unique to Andalusia or practised in a distinctive way). For example: having a siesta, sitting outside in the evening, visiting the sick or new mothers with food. Not coded, for example: a pilgrimage, a football match.

1.13. Flamenco culture and art

This code captures interviewees' references to activities involving flamenco, including both curricular and extracurricular activities. These activities may be formal or informal. It includes both theoretical activities (focused on the study of flamenco) and practical ones (involving performance, learning dances or songs, attending performances, exhibitions, etc.). The code applies to both general references to flamenco and specific references to its history, cultural creators, notable figures, customs, ways of life, etc. For example: gaining knowledge of flamenco, celebrating Flamenco Day, practical activities related to flamenco, the role of the Roma ethnic group in flamenco, etc. Not coded, for example: references to musical genres other than flamenco.

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1.14. Andalusian political geography

This category codes references made by interviewees to any activity related to the political geography of Andalusia, including both curricular and extracurricular activities. These activities may be formal or informal. The definition of Andalusia as an administrative and territorial unit – including its borders and institutions – constitutes one of the clearest expressions of the school's nation-building function. In general, this includes all activities organised by or involving the school that focus on fostering knowledge of Andalusia as an administrative and territorial entity. References to Andalusia as a region or autonomous community should be tagged under this code. For example: any activity in which students are introduced to the idea of Andalusia as an autonomous territorial unit. Not coded, for example: references to Andalusia's historical past or to its natural resources, which are instead coded as natural heritage.

1.15. Other Andalusian musical traditions

This category codes activities focused on Andalusian music other than flamenco, including both curricular and extracurricular activities. These activities may be formal or informal. In general, the activities should involve theoretical learning or practical engagement with the musical traditions of Andalusia and its constituent provinces. It is important to distinguish music as the central focus from instances where music serves merely as a medium to transmit another type of content (for example, the anthem). In such cases, the code should reflect the main subject rather than this category. For example: theoretical or practical activities on Carnival music, Christmas carols, rap battles or classical music when explicitly linked to the development of Andalusian identity – whether through use by Andalusians or association with Andalusian festivities. If the music is linked to cultural creators, both relevant codes should be applied. Not coded, for example: activities related to flamenco.

1.16. Andalusian natural heritage

This code captures interviewees' references to activities related to Andalusia's natural heritage, including both curricular and extracurricular activities. These activities may be formal or informal. In general, they should highlight the richness, diversity and distinctiveness of Andalusian nature in comparison with the rest of Spain. Focus may be placed on natural parks, biodiversity or the variety of landscapes (coastline, beaches, mountains, inland areas). For example: learning about Andalusia's protected natural areas or climate, visits to natural settings, etc. Not coded, for example: references related to Andalusian architectural heritage.

2. Opinion on the academic curriculum

This section refers to the information available concerning activities organised in relation to the academic curriculum. It addresses whether these activities are included in the official educational curriculum or not. The content reflects statements made by the interviewees. As such, it does not constitute an exhaustive compilation and, in some cases, respondents may be unable to offer a clear answer or may provide inaccurate information. Verification using external sources may therefore be required at a later stage.

2.1. Greater inclusion in the academic curriculum

This code captures interviewees' references to the lack of content, activities or celebrations related to Andalusian culture and identity. In general, it includes complaints, suggestions or observations concerning the absence or limited presence of material related to Andalusia within the academic curriculum. It also includes references to any activity described as having a connection – whether direct or indirect, strong or weak – to the official curriculum. These may be formal or informal activities. This code is particularly relevant when activities are described as being carried out despite not being part of the official curriculum. For example: extracurricular activities such as excursions, sports days, etc.

2.2. Inclusion in the academic curriculum

It also includes references to any activity described as having a connection – whether direct or indirect, strong or weak – to the official curriculum. These may be formal or informal activities. In general, this includes all activities reported to be undertaken as part of the academic curriculum. For example: when the activity is justified in its curricular position. Any planning undertaken by the teaching staff or department is always considered to be curriculum-related and should be coded accordingly. For example: a statement such as "flamenco is included throughout the programme" should be coded under this category.

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3. Activity format. Space and medium

This section refers to the format in which activities are organised. It considers both the physical space where activities take place (ranging from within the classroom to off-site excursions or home-based tasks) and the medium through which, or with which, the activity is carried out.

3.1. Space: inside the classroom

This code applies to references made by interviewees to any activity conducted within the classroom or elsewhere on school premises. These may be curricular or extracurricular, formal or informal. In general, this includes all activities that take place in the classroom setting. For example: lesson content, illustrative examples, anecdotes, etc.

3.2. Space: outside the classroom (within the school)

This code applies to references made by interviewees to any activity conducted within the classroom or elsewhere on school premises. These may be curricular or extracurricular, formal or informal. In general, it includes activities organised within the school but outside the classroom, such as flag-raising ceremonies, listening to the anthem, exhibitions, etc.

3.3. Space: outside the classroom (off-site visit or excursion)

This code applies to references made by interviewees to any activity conducted within the classroom or elsewhere on school premises. These may be curricular or extracurricular, formal or informal. In general, it includes activities organised outside the school, such as excursions, guided visits, etc.

3.4. Space: outside the classroom (at home)

This code applies to references made by interviewees to any activity conducted within the classroom or elsewhere on school premises. These may be curricular or extracurricular, formal or informal. It includes all home-based activities, such as homework, independent study of specific topics, etc.

3.5. Space: undefined

This code is used for references or comments not associated with a specific location. It may apply to personal opinions expressed by the interviewee or general remarks not tied to a particular setting or timeframe. It also includes experiences in other schools where the interviewee may have worked in the past. This category functions as a catch-all for spatially unclassifiable instances.

3.6. Medium: textbook content

This code applies to references to any activity explicitly based on or linked to textbook content, as indicated by the interviewee. It applies exclusively to formal curricular activities. For example: textbook exercises, discussion topics, images or audiovisual materials included in textbooks, etc.

3.7. Medium: external visit to the school

This code applies to references to any activity involving a visit to the school by an external person or group, as explicitly mentioned by the interviewee. These may be curricular or extracurricular, formal or informal. For example: visits by cultural or political figures, workshops run by the police, etc.

3.8. Medium: hands-on task

This code applies to references to any activity involving manual or practical work by students, as explicitly mentioned by the interviewee. These may be curricular or extracurricular, formal or informal. For example: singing, building models, writing essays, etc.

3.9. Medium: oral explanation by the teacher

This code applies to references to any activity explicitly based on oral explanations by the teacher, as explicitly mentioned by the interviewee. These may be curricular or extracurricular, formal or informal. For example: spoken anecdotes, illustrative explanations provided in class, etc.

4. Organiser and promoter of the activity

This section compiles information on the individuals or entities acting as organisers and promoters of the various activities with potential nation-building content. The promoter is the person or body from whom the initiative originates and/or who finances the activity (wholly or partially, where funding is required). The organiser is the person or group responsible for implementing the activity operationally. A single activity may involve more than one organiser and/or promoter.

4.1. Organiser: teaching staff (individual or collective)

This code applies to interviewee references to any activity organised by teaching staff. It includes both curricular and extracurricular activities, whether formal or informal. For example: plays, concerts, performances, lectures, discussion panels, internal competitions, sporting events, etc.

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4.2. Organiser: school (management or position of responsibility)

This code applies to references to any activity organised by the school, either through its management or by staff in positions of responsibility. It applies to curricular and extracurricular activities, all of which are formal in nature. For example: exhibitions, ceremonies, lectures, commemorative events, etc.

4.3. Organiser: other institution external to the school

This code applies to references to any activity organised by an institution external to the school. It applies to curricular and extracurricular activities, all of which are formal in nature. For example: activities to which schools are invited to participate voluntarily, workshops, visits to the school by external facilitators or representatives, etc.

4.4. Organiser: Parents' Association (AMPA)

This code applies to references to any activity organised by the Parents' Association (AMPA). It is limited to extracurricular activities, which may be formal or informal. For example: the organisation of social gatherings or end-of-year celebrations.

4.5. Promoter: school (management or position of responsibility)

This code applies to references to any activity promoted by the school, either through its management or by staff in positions of responsibility. It includes formal curricular and extracurricular activities. For example: exhibitions, ceremonies, commemorative events, etc.

4.6. Promoter: other institution external to the school

This code applies to references to any activity promoted by an institution external to the school. It includes formal curricular and extracurricular activities. For example: school competitions, workshops promoting specific values or healthy habits, etc.

4.7. Promoter: Parents' Association (AMPA)

This code applies to references to any activity promoted by the Parents' Association (AMPA). It is limited to extracurricular activities, which may be formal or informal. For example: support for social gatherings, school trips, etc.

4.8. Promoter: teaching staff (individual or collective)

This code applies to references to any activity promoted by teaching staff. It includes both curricular and extracurricular activities, whether formal or informal. For example: plays, concerts, performances, internal competitions, sporting events, etc.

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ARTICLE/ARTÍCULO

The Incorporation of Sustainability Policies in Andalusian Companies

La incorporación de las políticas de sostenibilidad en la empresa andaluza

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ABSTRACT

Sustainable and responsible business behaviour has evolved from aspiration to expectation. Today's companies – regardless of turnover – face mounting pressure from both society and public authorities to demonstrate genuine commitment to environmental and social responsibility. Yet the path to sustainability remains fraught with obstacles: knowledge gaps, insufficient training, absent strategic planning, financing constraints, limited public incentives and regulatory frameworks that can overwhelm rather than enable. This article synthesises insights from the BeSustainableCo project, which culminated in establishing an observatory dedicated to monitoring Andalusian companies' social commitment to their environment and stakeholders.

KEYWORDS: sustainable business behaviour; Andalusian business; ESG; sustainability; stakeholders.

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RESUMEN

Alcanzar un comportamiento empresarial sostenible y responsable está siendo un reclamo tanto por parte de nuestra sociedad, con independencia del volumen de negocio que tenga la empresa, como de los poderes públicos, en defensa del interés general. Sin embargo, no resulta fácil la consecución de este fin por diversos motivos. Entre ellos, destaca el desconocimiento, la falta de formación e incentivos, la ausencia de una planificación estratégica de la compañía, las dificultades de financiación, la escasez de incentivos públicos y la presión normativa que, en ocasiones, suponen una carga excesiva para las empresas. El presente trabajo trata de reunir las conclusiones alcanzadas durante la ejecución del proyecto denominado BeSustainableCo, que ha permitido la puesta en marcha de un observatorio sobre el compromiso social de la empresa andaluza con su entorno y stakeholders.

PALABRAS CLAVE: comportamiento empresarial sostenible; empresa andaluza; ESG; sostenibilidad; stakeholders.

1. Introduction

The United Nations General Assembly's adoption of "Transforming our World: the 2030 Agenda for Sustainable Development" on 25 September 2015 marked a watershed moment in global environmental policy. This comprehensive action plan, centred on 17 Sustainable Development Goals (SDGs) and 169 specific targets, has been embraced by numerous UN member states.[1]

Each signatory nation has subsequently charted its own course, translating these universal aspirations into national strategies tailored to local challenges. Spain,[2] for example, has identified eight specific challenges spanning the economic, social and environmental domains. Recent voluntary assessments of progress towards these objectives underscore the significant commitment the Spanish State has undertaken.[3]

At the regional level, the Autonomous Community of Andalusia[4] approved its distinctive strategy in 2018, built upon two foundational pillars: advancing a green economy whilst simultaneously strengthening social cohesion. This dual approach reflects a sophisticated understanding that environmental and economic sustainability cannot flourish without a cohesive society, and that economic models fundamentally shape sustainable development outcomes. For businesses, this translates into an imperative to transition towards models deeply integrated with their surrounding environment.

Andalusian companies have been steadily advancing this agenda, positioning themselves at the forefront of a global sustainable development movement. Evidence from a Global Compact study examining over 2,500 Spanish companies – including 180 from Andalusia – reveals widespread familiarity with the sustainability framework, though only 47% claim in-depth knowledge of the SDGs.[5]

More encouragingly, the research demonstrates that 85% of Andalusian companies have progressed beyond commitment to concrete action, actively implementing initiatives aligned with the SDGs. This represents more than mere corporate social responsibility theatre. The sustainability imperative has become integral to competitive positioning in markets where customers grow increasingly demanding and better informed. For these stakeholders, achieving the SDGs whilst time still remains offers hope – the prospect of leaving future generations a healthier planet and improved world.

Beyond idealism, companies recognise the tangible competitive advantages flowing from SDG alignment, particularly regarding gender equality, responsible consumption and production, clean energy access, and decent work coupled with economic growth. Furthermore, Andalusian enterprises increasingly recognise the necessity of cultivating specialised sustainability teams whilst ensuring that senior and middle management comprehend both the opportunities and obligations sustainability entails.

Consequently, business corporations have been recalibrating their priorities, evolving from singular focus on profit maximisation for shareholders towards objectives that harmonise economic success with enhanced environmental, social and governance performance. This reflects the ESG criteria from which the SDGs derive their practical application.

Against this backdrop, our research team has synthesised the main conclusions extracted from university–business seminars conducted throughout project implementation, offering insights into how sustainability policies are being woven into the fabric of regional business practice.

2. Incorporating Sustainability Policies into Companies

2.1. Regulatory Framework

The regulatory architecture governing corporate sustainability has expanded considerably in recent years, though not always coherently. Sustainability requirements have been embedded in sector-specific legislation addressing energy, tourism and transport, whilst simultaneously being employed in soft law instruments such as corporate governance codes. Understanding this multifaceted regulatory landscape proves essential for companies navigating sustainability obligations. A significant development has been the migration of certain soft law recommendations into binding legal requirements. Corporate social responsibility (CSR) strategies exemplify this evolution.[6]

What began as voluntary guidance has crystallised into mandatory obligations, with CSR policy formulation and the accompanying monitoring reports now required by law. Within the framework of listed companies with indelegable powers[7], Article 529 *ter*.1(a) and (j) of Royal Legislative Decree 1/2010 of 2 July, approving the consolidated text of the Capital Companies Act (***Ley de Sociedades de Capital***, hereinafter, LSC) designates as non-delegable Board of Directors' responsibilities to both approve corporate social responsibility policy and supervise non-financial information preparation and presentation.[8]

These provisions entered Spanish law through Act 31/2014 of 3 December, which reformed the LSC to strengthen corporate governance, and Act 11/2018 of 28 December, which amended the Commercial Code, the LSC and Act 22/2015 of 20 July on Auditing, regarding non-financial information and diversity (hereinafter, Act 11/2018). Following this legislation's approval, designated companies[9] must incorporate into their accounting documentation – specifically within non-financial information statements – details concerning environmental and social matters, their workforce, human rights and anti-corruption efforts. Each data category carries minimum disclosure requirements.[10]

This information appears either within management reports or separate non-financial information documents (Arts. 262.1 and 5 of the LSC), and its preparation falls under the responsibility of the administrative body (Art. 253.1 of the LSC), requiring plenary Board discussion and signatures from all directors, with any absences explained (Art. 253.2 of the LSC).

The General Meeting approves these reports under Art. 160(a) of the LSC,[11] typically requiring simple majority approval for public limited companies (Art. 201 of the LSC) and ordinary majority for limited liability companies (Art. 198 of the LSC).

The 2020 Code of Good Governance (*Código de Buen Gobierno*, hereinafter, CBG 2020) introduced substantive changes within soft law frameworks, establishing Principle 24 to promote sustainability policies in environmental and social domains through Board transparency and disclosure obligations. Recommendation 55 defines the content these policies should encompass, specifying principles, commitments and mechanisms for their drafting, implementation and dissemination.[12] Significantly, the CBG 2020 marks a terminological evolution, superseding the concept of CSR – recognised in the 2015 version of the CBG – with the broader notion of sustainability policies.

This shift precipitated revisions to non-financial reporting requirements. The Corporate Sustainability Reporting Directive (CSRD) – Directive (EU) 2022/2464 of the European Parliament and of the Council of 14 December 2022 amending Regulation (EU) No 537/2014, Directive 2004/109/EC, Directive 2006/43/EC and Directive 2013/34/EU, as regards corporate sustainability reporting – has driven replacement of non-financial information reports with sustainability reports.

Spanish transposition legislation follows the Directive's framework, replacing non-financial information reports with sustainability reports that have essentially identical content and procedures as their predecessors. Strictly speaking, this represents a terminological refinement rather than a substantive transformation, as the reporting obligations, responsible parties and supervisory mechanisms remain largely unchanged.

CBG 2020 Recommendation 53 requires companies to assign oversight of environmental, social and corporate governance policies and rules to one or several Board committees.[13] Either audit or appointments committees may assume this responsibility, or companies may establish dedicated sustainability or CSR committees.[14]

Given the emphasis of the CSRD and other soft law instruments, the audit committee emerges as the logical supervisory body, a non-executive committee that functions as guarantor of financial and non-financial information transparency, integrity and veracity.[15]

The Spanish National Securities Market Commission's (CNMV) updated Technical Guide on Audit Committees of Public Interest Entities[16] reinforces this interpretation, anticipating audit committee control over sustainability information parallel to its existing financial and non-financial oversight duties. Even where alternative committees oversee sustainability reporting and policy execution, audit committees retain ultimate monitoring responsibility, as the Guide suggests.

Companies typically operationalise these policies by appointing sustainability officers who join sustainability policy drafting committees. These officers identify stakeholders and their needs, establish ESG processes and controls, direct approved sustainability policy implementation, report progress, recommend improvements and assess sustainability risks affecting the company. They serve as crucial conduits of sustainability information to Boards of Directors.

2.2. Implications of Incorporating Sustainability in Corporate Governance[17]

Sustainability constitutes a cross-cutting imperative transcending sectors. Whether companies operate in textiles, food production, construction, logistics or transport, all must embed sustainability criteria within their organisational core – their governance structures.

Integrating sustainability into corporate governance is what fundamentally transforms enterprises into sustainable entities, as governing bodies' approaches and values inevitably permeate business decisions.

Contemporary corporate governance sustainability carries implications far exceeding earlier conceptions, when sustainability pertained exclusively to director remuneration (requiring alignment with the long-term profitability and sustainability of the company – Arts. 217.4, 511 *bis* 1(c) and 529 *novodecies* 3.3 of the LSC). Directors' fiduciary duties have evolved, now requiring subordination of personal interests not merely to corporate interests but to the company as a holistic entity (Art. 225.1 of the LSC). Additionally, managers must now submit annual non-financial information reports, driven by the CSRD and the forthcoming Directive (EU) 2024/1760 of 13 June (awaiting transposition).

Approximately 30 Andalusian companies examined through our research demonstrate authentic commitment to sustainability. All have implemented measures enhancing their positive environmental and social impact – recycling programmes, renewable energy adoption – convinced that such practices deliver value to both customers and investors. Tellingly, company leaders assert they would maintain these initiatives even in the absence of regulatory mandates and soft law guidelines. Indeed, this sustainability "regulatory tsunami" is viewed sceptically by companies.

These measures typically emerge from governance structures themselves committed to sustainability. Many companies have integrated sustainability specialists into organisational hierarchies to guide policy development. Their inclusion varies with corporate characteristics: some specialists join Boards directly, whilst in family-owned or listed companies they may function as independent advisory committees or report to chief executive officers.

Notable practices include comprehensive training programmes for managers and employees, with forward-thinking companies extending training to suppliers to maintain value chain sustainability. Many companies now require significant investments to be justified in terms of sustainability.

Corporate governance strengthens sustainability fundamentally through two mechanisms: establishing time-bound objectives within European initiative frameworks, and forming strategic alliances with other companies to combine efforts and share sustainability challenges. Managers emphasise that coordinated, sustained action – rather than isolated gestures – proves most effective in addressing genuine sustainability challenges.

2.3. Profit and the SDGs: a Critical Examination[18]

One seminar brought together contrasting academic and practical perspectives that illuminated tensions between traditional profit motives and emerging SDG imperatives.

Professor Giorgio Meo, a commercial law professor at LUISS University in Rome and a practising lawyer, articulated a reconceptualised understanding of profit. Rather than viewing profit as shareholders' property right for immediate distribution, he argues contemporary profit should be understood as capital for reinvestment to sustain long-term company viability. This shifts profit from short-term shareholder distribution towards long-term corporate sustainability within SDG frameworks.[19]

However, this strategic reorientation towards prudent ESG-aligned activity initially generates higher costs, reducing shareholder returns.[20] Given the impact it has on shareholders, such strategies – whilst grounded in sound management – require corporate approval. As such, companies may voluntarily adopt SDG-compatible measures, typically motivated by market demands and opportunities, through statutory mechanisms that seek to harmonise profit motives with broader social purposes. Alternatively, legislators could mandate more complex social purposes for corporations, suggests Professor Meo.

He also noted that many legal systems are laying groundwork for imposing social requirements on private enterprises through legislative policy. Yet legislators must transcend political objectives, introducing market control mechanisms to ensure all operators compete equitably. Critically, investors – the foundation of any private company – must perceive adequate investment returns to sustain interest in sustainability-focused management. For business organisation to be successful, it must enable long-term value creation in a way that satisfies the interests of all stakeholders.

Antonio Roncero, a professor in commercial law at the University of Castilla-La Mancha and of counsel at the law firm Écija Abogados, raised two critical questions concerning the implementation and mainstreaming of instruments designed to achieve the SDGs: the suitability of sustainable investment and, perhaps more fundamentally, its actual sustainability. Europe has devoted considerable effort to promoting sustainable investment, yet this promotion remains contingent upon profitability – a reality reinforced by approaches emerging from the United States.

Common strategies such as positive and negative screening or enhanced asset manager engagement in corporate affairs have, in practice, failed to genuinely advance sustainability. Professor Roncero warns that measures ostensibly designed to promote socially sustainable investment have devolved into narrow interventions: encouraging shareholder engagement, combating greenwashing and intensifying regulatory pressure on asset managers and financial intermediaries. Paradoxically, this approach has achieved outcomes contrary to its stated intentions. Regulatory fragmentation and inadequate coordination have generated market confusion, inadvertently encouraging the very greenwashing practices regulators sought to prevent, all whilst failing to guarantee genuine sustainability in products or services. In Professor Roncero's assessment, regulators moved precipitously, acting with unwarranted haste. Effective coordination proves paramount in such contexts; non-financial information holds value for sustainability only insofar as it adequately informs shareholders. Beyond this, establishing political and social platforms where sustainability discussions can occur outside formal corporate agreements merits serious consideration.

The practice of linking sustainability objectives to director compensation presents additional hazards. Such linkage proves defensible only when shareholders themselves select the objectives and – critically – when achievement can be objectively measured. Whether the draft Due Diligence Directive will address these fundamental deficiencies remains an open question.

Information asymmetry compounds these challenges, preventing consumers from making informed assessments of product or service sustainability. The evidence increasingly suggests that public authorities have failed to achieve sustainability goals through their chosen mechanisms. Rather than acknowledging this failure, they have shifted burdens onto companies without adequately considering that sustainability costs can, particularly in early stages, impede growth.

Professor Roncero argues persuasively that the Spanish legislator's chosen path – pursuing ESG objectives exclusively through company law reform – fundamentally misapprehends the challenge. Whilst company law can certainly adapt to accommodate sustainability objectives, such adaptation must proceed

in tandem with demonstrable sustainability profitability. The mechanisms capable of consolidating business sustainability must ultimately emerge from economic solutions that address sustainability's inherent tensions and trade-offs.

3. Priority and Sectoral Areas of Action for Incorporation of Sustainable Policies in Companies

3.1. Digitalisation and Corporate Governance[21]

Digitalisation contributes substantially to improved coordination and transparency, not only amongst corporate bodies, partners and administrative structures, but also in relationships between companies and their diverse stakeholders.

Throughout our research seminars, we examined what digitalisation can mean for corporate governance and identified specific contexts in which it functions as a positive force for company sustainability.

The relationship between digitalisation and sustainability necessarily invokes the concept of "sustaining something" – maintaining it over time. Something proves sustainable when it possesses the resources and conditions to remain functional for a determined period. Organisations that optimise energy resource consumption, diversify their sources whilst considering future generations' needs, and create businesses capable of long-term viability exemplify this principle. Digitalisation undoubtedly plays a fundamental role in this optimisation and diversification of resources, yielding cost reductions that enhance profitability and promote sustainability.

Regarding digitalisation's relationship with corporate governance, we must bear in mind that corporate governance encompasses a series of principles, rules and procedures responsible for regulating how a company's governing bodies structure themselves and operate. Deploying technology and digitalisation within corporate governance enables the achievement of several objectives:

- opening new communication channels to express ideas clearly, both internally to shareholders and to external agents involved with the organisation;
- maintaining comprehensive records of decisions requiring action;
- and defining precisely which person or department bears responsibility for each decision.

Social economy companies merit particular interest in this context. These entities are characterised by the primacy of people and social purpose over capital in cooperative enterprises. Additionally, significant support exists for these organisations through subsidies and grants.

The European Commission adopted its Action Plan for the Social Economy on 9 December 2021,[22] presenting concrete measures designed to mobilise the sector's full potential, building upon results from the 2011 Social Business Initiative and the 2016 Start-up and Scale-up Initiative.

Spain, for its part, approved the Spanish Sustainable Development Strategy for these companies, aiming to provide economic stimulus. Cooperatives represent a prototype of sustainable businesses. However, many cooperatives fail to deploy funds earmarked for sustainability, waiting for the opportune moment which ultimately never arrives, resulting in wasted resources. There exist, moreover, entities in which sustainability is measured – companies of common benefit and interest that operate under mechanisms measuring impact on both society and workers.

Regarding digitalisation specifically, we must emphasise its importance both in fostering relationships between companies and their partners and in enhancing competitiveness, which constitutes its principal purpose. Training in digitalisation proves necessary to ensure better preparation for progress, just as increased financing is essential to render improvement and advancement possible.

3.2. Challenges of Financial Sustainability and Outstanding Issues[23]

The latest regulations and documents analysed throughout our seminars on green finance include the European Commission's 2018 working document on Impact Assessment, Regulations (EU) 2019/2088 and (EU) 2020/852, and the *Quick Reference Guide on Sustainable Finance* published by the Spanish National Securities Market Commission (CNMV).

One principal conclusion emerged after analysing these regulations: for finance to achieve genuine sustainability, economic agents must add three sustainability objectives – environmental, social and governance – to the three classic factors traditionally employed in assessing investment quality that ultimately determine investment decisions (profitability, risk and liquidity).

Focusing on this regulatory framework, five pillars can be identified that underpin financial sustainability. First, the taxonomy – that is, the common classification system or "dictionary" that enables objective evaluation of ESG criteria when making investment decisions. Second, transparency resulting from the reporting obligations imposed upon financial and non-financial companies, designed to enable investors to make properly substantiated sustainable investment decisions. Third, benchmarks that assess companies' sustainability performance.

Fourth, corporate information, consisting of disclosure obligations regarding non-financial information and diversity information by large companies and groups. Finally, product governance or "sustainable investment tools" – the nomenclature given to the set of ratings, common standards and labels that aim to enhance transparency and mitigate greenwashing risks.

3.3. Transport Sustainability Challenges

Sustainable transport or mobility involves a comprehensive set of measures aimed at making the movement and transport of people and goods efficient and rational from economic, social and environmental perspectives. In recent years, we have witnessed an ongoing process of ecological transition across different transport modes.

In air transport, the transition focuses primarily on the adoption of alternative fuels – specifically on decarbonisation and noise reduction. According to the latest data published by the Spanish Aviation Safety and Security Agency (AESA) in 2022, flights departing from EU 27 + EFTA airports accounted for 12% of total greenhouse gas emissions from transport and 4% of total greenhouse gas emissions across EU 27 + EFTA territories. In 2023, flights departing from these airports emitted 133 million tonnes of CO_2, representing a 10% reduction compared to 2019 levels.[24]

Focusing on decarbonisation procedures specifically, attention should be drawn to the adoption of Regulation (EU) 2023/2405 on ensuring a level playing field for sustainable air transport (ReFuelEU Aviation). This regulation creates a legal framework designed to promote the progressive supply and adoption of sustainable aviation fuels (SAF)[25] throughout the EU. Currently, Member States have established a target to reduce CO_2 emissions from international aviation by 5% by 2030 through the deployment of SAF, necessitating increased SAF production processes through the construction of new plants and an increase in the capacity of existing facilities.

Failure to achieve these objectives can lead to companies being held responsible, directly affecting their corporate governance, since administrative bodies can incur environmental responsibility[26] if they fail to reduce gas emissions[27] or noise generation[28] adequately.

Regarding rail transport, we note that sustainable initiatives have, for the most part, already been implemented. The railway network operates fully electrified and is powered by Guarantee of Origin renewables. The critical focus at present centres on modal shift – that is, on reducing emissions by replacing private vehicles with trains for short and medium distances, and reducing short-haul air travel.[29] This task must be accomplished through public awareness-raising and education, combined with transport company commitments to increase train supply and frequency.

Concerning awareness-raising, another important dimension involves the urban mobility sector. A decisive element in this field involves reducing pollution and promoting renewable energies in public transport. In this regard, we have been able to examine strategies carried out by certain public companies, such as Empresa Malagueña de Transportes (EMT), the company responsible for Málaga's public transportation. Its sustainability policies encompass renewal of the fleet with more efficient and eco-friendly vehicles (hybrid and electric vehicles), water heating using solar panels, LED lighting, sectorisation of air conditioning with dedicated equipment, installation of photovoltaic blankets on buses for battery recharging, 100% electricity supply from renewable energies, product reuse and recycling, responsible purchasing practices, creation of intelligent route management systems and digitalisation of payment methods, amongst other initiatives.

3.4. Challenges and Strategies for Food Sustainability

The European Green Deal[30] considered it appropriate to reflect upon clean energy supply in economic sectors such as food and agriculture. The Commission has promoted the "farm to fork" premise to devise a fair, healthy and environmentally friendly food system. Within this context, which extends to fishing as well, food products must meet quality standards.

Recognition of quality, amongst various alternatives, operates through certain legal figures regulated at both national and European levels. Quality distinctions enable consumers to obtain better information about aspects such as food origin, nutritional value and environmental footprint. Amongst the various distinctive signs of quality, designations of origin and geographical indications stand out prominently. Both promote social sustainability whilst also advancing the circular economy.[31] In particular, they provide information about products' special characteristics derived from natural and/or human factors specific to the place of origin.

The approval of Regulation (EU) 2024/1143 of the European Parliament and of the Council of 11 April 2024 on geographical indications for wines, spirit drinks and agricultural products, as well as traditional specialities guaranteed and optional quality terms for agricultural products, amending Regulations (EU) No 1308/2013, (EU) 2019/787 and (EU) 2019/1753 and repealing Regulation (EU) 1151/2012, has introduced certain changes in intellectual property rules, especially regarding the inclusion of sustainable practices in the production of geographical indications, albeit on a voluntary basis.[32] Sustainable practices that may be established as requirements in the production of a product under a geographical indication include: climate change mitigation and adaptation; conservation and sustainable use of soils, landscapes, water and natural resources; preservation of biodiversity; conservation of rare seeds, indigenous plant breeds and varieties; and animal welfare, amongst others (Article 7 of the Regulation).

Another aspect warranting consideration involves the sustainability of the food chain. Agri-food companies bear the obligation to require their suppliers to provide comprehensive information related to their activities, enabling supervision to ensure they operate sustainably across three fields: social, environmental and economic.[33]

Market operators in Spain, in accordance with Act 12/2013 of 2 August on measures to improve the functioning of the food chain (as amended by Act 16/2021 of 14 December), are subject to the Code of Good Commercial Practices in Food Procurement. This document contains principles that must be respected, including the principle of food chain sustainability. It consists of food chain operators and their associations committing to consider commercial relations between operators from the perspective of overall food chain sustainability. This commitment is equally present in the National Food Strategy.[34]

Within the framework of food chain sustainability, sustainable distribution of added value amongst the members of the chain also assumes centre stage. This concerns seeking a balance between all participants, avoiding asymmetries that have traditionally existed, which primarily affect the small entrepreneurs who occupy the first links in the chain.

3.5. Challenges and Strategies for Sustainable Tourism[35]

Tourism represents one of the productive sectors in which sustainability policies carried out by both public authorities and private entities are gaining particularly significant prominence.

Public administrations must undertake responsible territorial and urban planning, conserve and preserve natural areas, create modern, safe infrastructure adapted to the environment, provide sustainable mobility, develop plans for beautification and improvement of tourist areas, and manage waste treatment and wastewater treatment effectively. Evidence of this commitment can be found in the Andalusian Government's presentation of the Preliminary Draft Law on Sustainable Tourism.[36]

In the private sector, sustainability principles must be integrated by tourism companies through the incorporation of ESG criteria into policies designed and approved by corporate bodies, through reinvestment and constant improvement, by offering diversified and sustainable products and services, and through developing circularity plans.[37] Additionally, these policies have become a demand from users themselves.

According to Booking.com's[38] latest 2024 Sustainable Travel Report, 74% of tourists state they want to travel more sustainably over the next 12 months; 58% of travellers believe that more sustainable travel options prove too expensive, in contrast to 39% who are willing to pay more for travel options with sustainable certification.

Some of the particular initiatives that travellers themselves undertake, contributing to sustainability, include turning off accommodation air conditioning when absent (74%, representing a 43% increase compared to 2022), reusing the same towel several times (66%, a 40% increase compared to 2022) and using their own reusable water bottles (57%, a 32% increase compared to 2022).[39]

The design of sustainability policies holds particular relevance for tourism companies for several reasons. It represents an opportunity to gain efficiency, optimise resource use and reduce costs. The ability to innovate and adapt determines both destination and market competitiveness. Additionally, sustainability policies generate new income sources and facilitate access to public and private financial resources. Specific aspects such as the circular economy contribute to product resale, repair and collaboration with local companies. Naturally, all these elements produce positive effects on reputation and brand image.

Spain's 2030 Sustainable Tourism Strategy[40] is currently in the preparation phase, though private initiative has already launched specific actions aimed at promoting sustainable tourism. Based on knowledge of the tourism market and work carried out thus far, thanks to one of the hotel groups invited to participate in our seminars, we have identified four principal challenges facing tourism companies: management of environmental impact and natural resources; achieving balance between the sustainability and profitability of tourism activity; social rejection of destinations; and collaboration and dialogue amongst the agents involved.

Regarding the principal strategies for the sector, as highlighted by Andalusian tourism companies, they can be grouped into two main categories: economic and regulatory. The first group targets achieving sustainable financing through grants and green credits. This would involve offering low-interest financing for companies that adopt sustainable practices, such as renewable energy or efficient resource management. This strategy can also be realised through tax rebates, for example in corporate income tax, benefiting tourism companies that meet sustainability standards in the tax base or quota. Additional economic strategies include promoting the circular economy and decarbonisation by encouraging material reuse and proper waste management in hotels, restaurants and tourism activities, as well as creating alliances between local businesses to share resources and reduce environmental impact. Diversification of tourist offerings by encouraging development beyond sun-and-beach tourism, as well as cultural activities that reduce dependence on crowded areas, constitutes another key economic approach.

The second group of regulatory strategies has become a sector demand: establishing clear limits and regulations on sustainable tourism development[41] that facilitate implementation; promoting certifications and mandatory standards; protecting ecosystems and local culture; and advancing governance and strategic alliances for achieving objectives within the 2030 Agenda framework.

4. Conclusions

One. The Andalusian business community demonstrates awareness of its environment, conscious of the importance of giving back to its surroundings. Much of corporate governance across companies is working to incorporate sustainability policies of varying ambition, depending on company size and complexity. Simultaneously, these companies remain aware of the liability they may incur as a result of omitting these duties.

Two. Existing regulatory pressure sometimes paradoxically renders sustainability policies themselves unsustainable. The regulations approved in recent years have contributed to companies incorporating sustainability policies, yet sometimes the burden and requirements of a documentary and administrative nature – such as preparing reports or measuring the impact of implemented policies – involve excessive costs that are, in many cases, difficult to assume.

Although in most cases SMEs and micro-enterprises do not fall within the direct scope of regulatory application, they are affected indirectly as holders of established business relationships with large companies (of which they are suppliers) and by the market's own requirements, meaning they too will be subject to ESG criteria compliance.

Three. From a sectoral perspective, each productive sector exerts a different impact on the environment, so the measures they implement regarding sustainability differ from one case to another. By way of example, transport has a significant impact on the environment and the depletion of natural resources, so strategy must be oriented towards seeking alternative energies and reducing pollution. Meanwhile, tourism has a significant social impact, so initiatives must be implemented to enable tourists and residents to coexist harmoniously.

A common feature of this sectoralisation is the use of external financing or applying for aid. In these cases, the criterion of sustainability is increasingly used as a measure for granting them.

Four. As a final reflection, the Andalusian business fabric currently finds itself in a moment of decisive transition, where the need to adapt to new global demands converges with the opportunity to redefine its productive model regarding sustainability. Far from being a passing trend, the integration of environmental, social and governance (ESG) criteria is consolidating as a strategic component for competitiveness and business resilience, especially in a context of climate change, digital transformation and growing social demands.

Andalusian business, marked by a strong presence of SMEs and micro-enterprises, operates in an environment characterised by certain structural fragility but also by high capacity for adaptation. In recent years, there has been greater awareness of sustainability, not only as a reputational issue but as a pathway to access new

markets, attract investment, retain talent and ensure business continuity in the medium and long term. However, this evolution proceeds neither homogeneously nor without obstacles.

From a sectoral perspective, Andalusia presents great productive diversity, ranging from sectors highly dependent on natural resources, such as agriculture, to activities with strong social impact, such as tourism. This plurality requires differentiated solutions and flexible public policies, capable of promoting ecological transition without compromising the economic viability of strategic sectors.

In short, Andalusian companies face the challenge of combining sustainability with profitability in a complex environment. For this process to consolidate, it will be essential to strengthen public–private partnerships, invest in training, promote green innovation and design a strategy adapted to the uniqueness of Andalusian territory. Only in this way will sustainability cease to be a burden and become a genuine lever for transformation and development.

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Notes

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3 This is reflected in the Voluntary National Review on the Implementation of the 2030 Agenda, available at https://www.dsca.gob.es/sites/default/files/derechos-sociales/ENV2024EN_0.pdf

4 Agreement of 5 June 2018 of the Governing Council approving the Andalusian Sustainable Development Strategy 2030. Andalusian Ministry of the Environment and Territorial Planning.

5 Contribution of Andalusian companies to the 2030 Agenda. Results of the Business Consultation on Sustainable Development, January 2023 (in Spanish), available at https://info.pactomundial.org/consultaempresarialandalucia.

6 Concern about the effects of commercial companies on the environment has generated various movements and consequently different concepts. On the one hand, there is the notion of corporate social responsibility (CSR) – which, in the words of Sequeira (2021), means that companies pay attention to "the various interests that, other than those of shareholders, are affected by their relationship with the business organisation of which the company is the owner (customers, distributors, workers, etc.) and their concern for the impact that corporate activity may have on the environment and society in which it operates, including corporate governance". The CSR concept has also been employed beyond the corporate sphere, extending the scope of such policies to companies in general, regardless of their legal form.

On the other hand, recent changes in corporate governance and the promotion of public policies focused on protecting the environment and the economic and social spheres have introduced the concept of sustainability policies. Following leading scholarship – see Peinado (2019) – the fashionable term "sustainability" in its strict meaning refers to that which "is linked to [...] the creation of value for society [...] and everything that is linked to relations with stakeholders". In this way, CSR is subsumed within sustainability (representing the evolution of CSR, as Peinado [2024, p. 279] points out), with shareholder interests and value creation becoming integral to this policy. As the author recalls (ibid., p. 280), we must not forget the impossibility of "replacing the essential purpose of capital companies – shareholder profits – with other new purposes, but rather complementing each other".

7 On the Board of Directors as the body responsible for CSR, see Embid and Del Val (2016, pp. 325 et seq.). The authors clarify that for unlisted companies, this must also be considered a non-delegable Board competence pursuant to Art. 249 bis of the LSC. This provision entrusts the Board with generic competence to determine the company's general policies and strategies, within which the sustainability strategy must be understood as included.

8 Recommendation 55 of CBG 2015 appeared to require listed companies to prepare a separate CSR report from the non-financial information statement, despite the two having substantially identical content. Del Val (2019, pp. 185–186) analyses this duplicity, noting that for listed companies, the CSR report obligation is understood to be fulfilled through the non-financial information report.

9 This obligation extends beyond listed companies, applying to any company provided it does not qualify as a small or medium-sized company in accordance with Directive 2013/34/EU.

10 The list of information that the non-financial information statement must contain is quite extensive and is exhaustively described in Art. 49 of the Commercial Code.

11 It goes without saying that in accordance with the aforementioned Art. 529 *ter*.1(a), the Board of Directors is competent to approve the CSR policy.

12 See Embid (2022, p. 551).

13 In addition to internal institutionalised oversight, external oversight is entrusted to public authorities according to sustainability policy topics, and non-institutionalised oversight is carried out by both internal and external stakeholders. On this issue, see Ramos (2023, p. 2562).

14 On this specialised commission, see González Sánchez (2021), consulted online, and Bautista (2016, pp. 157 et seq.).

15 On this issue, see González Fernández (2025) and Peinado (2025).

16 Technical Guide 1/2024 on Audit Committees at Public-Interest Entities, 27 June 2024, available at https://www.cnmv.es/DocPortal/Legislacion/Guias-Tecnicas/GT_ComisionesAuditorias_en.pdf.

17 These conclusions have been drawn from the seminar "The Incorporation of Sustainability in Corporate Governance of Andalusian Companies", conducted within the framework of the BeSustainableCo Project. Information (in Spanish) available at https://andaluciasostenible.es/la-incorporacion-de-la-sostenibilidad-en-el-gobierno-corporativo-de-las-empresas-andaluzas/.

18 These conclusions have been drawn from the seminar "Andalusian Companies in the Face of the 2030 Agenda Strategy", conducted within the framework of the BeSustainableCo Project. Information (in Spanish) available at: https://andaluciasostenible.es/la-empresa-andaluza-ante-la-estrategia-de-la-agenda-2030/.

19 On purpose capital companies, see González Arjona (2024, pp. 105 et seq.).

20 Rodríguez, Gaspar and Sánchez's (2020) study demonstrates how achieving strong financial results is considered key to maintaining corporate social responsibility policies over time.

21 Part of these conclusions have been drawn from the seminar "Analysis of the Impact of Digital Technologies Applicable to Business Sustainability", conducted within the framework of the BeSustainableCo Project. Information (in Spanish) available at: https://andaluciasostenible.es/analisis-del-impacto-de-las-tecnologias-digitales-aplicables-a-la-sostenibilidad-empresarial/.

22 See Vargas Vasserot (2022).

23 Part of these conclusions have been drawn from the seminar "Sustainable Business Investment: New Challenges", within the framework of the BeSustainableCo Project.

Information (in Spanish) available at: https://andaluciasostenible.es/inversion-empresarial-sostenible-nuevos-desafios/.

24 Data published by EASA in the European Aviation Environmental Report 2025, available at https://www.easa.europa.eu/sites/default/files/eaer-downloads/EASA%20EAER%202025_BROCHURE_WEB_%CE%95%CE%9D.pdf.

25 These types of biofuels are used in jet aircraft. They have a lower carbon footprint than traditional fuels both in composition and production method and are certified as sustainable by independent entities. They include both fuels produced from organic products and plant or animal material, as well as synthetic fuels produced through more sustainable alternative sources than conventional fossil fuels (Parejo Navajas, 2022).

26 On this issue, see De Vivero (2024).

27 See Molina (2016, p. 220).

28 The arrival of urban air mobility in recent years has also contributed to reducing pollution and the carbon footprint. This refers to VTOLs and drones – small all-electric aircraft that allow transport of a small number of people. They represent a sustainable transport mode, ensuring safety and noise reduction for the population. On this new air modality that contrasts with conventional aviation, see Otero (2025).

29 See Otero (2025).

30 Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions COM/2019/640 final, of 11 December 2019.

31 On the importance of the circular economy for businesses, see Sánchez Teba (2024).

32 See Montero García-Noblejas (2023).

33 See Boquera (2024, p. 28).

34 Executive Summary (in English) available at https://www.mapa.gob.es/dam/mapa/contenido/alimentacion/temas/estrategia-nacional-de-alimentacion/0.-subhome/executivesummaryena.pdf; full document (in Spanish) available at https://www.mapa.gob.es/es/alimentacion/temas/estrategia-nacional/estrategianacionaldealimentacion_tcm30-700687.pdf.

35 Part of these conclusions have been drawn from the seminar "Economic and Regulatory Strategies for Sustainable Tourism", within the framework of the BeSustainableCo Project. Information (in Spanish) available at: https://andaluciasostenible.es/analisis-del-impacto-de-las-tecnologias-digitales-aplicables-a-la-sostenibilidad-empresarial/.

36 The published document (in Spanish) is available at https://www.juntadeandalucia.es/sites/default/files/2025-02/03%20TAE%20250205%20MAIN%20Anteproyecto%20Ley%20de%20Turismo%20v5%28F%29.pdf

37 As an example, the Balearic Islands is the first autonomous community to have legislation advocating the integration of circularity in tourist accommodation through company governance: Act 3/2022 of 15 June on Urgent Measures for the Sustainability and Circularity of Tourism in the Balearic Islands. The legislation requires tourism companies to prepare a circularity plan, identifying the organisational structure and those directly responsible for the plan, as well as detailing their commitments made for implementing circular economy principles, lines of action and good practices structured around priority areas (energy, water, materials and waste, food), and the plan's monitoring and evaluation system: periodic reports and evaluation criteria or methods. Once these actions have been completed and accredited, the company receives certification proving its adherence to the circularity strategy. Failure to have these plans can result in fines ranging from €40,001 to €400,000.

38 The full report has not yet been published, though a summary (in Spanish) is available at https://news.booking.com/es/un-alojamiento-certificado-como-sostenible-resulta-mas-atractivo-para-el-40-de-los-viajeros-espanoles1/.

39 All information is available (in Spanish) at https://news.booking.com/es/informe-de-viajes-sostenibles-2023/

40 At the international level, notable initiatives include UN Tourism's Global Tourism Plastics Initiative and Global Roadmap for Food Waste Reduction in the Tourism Sector, the EU Commission's 2018 European Strategy for Plastics in a Circular Economy and Spain's 2023 Handbook for the Transition from a Tourism SME to a Circular Economy.

41 Regarding sustainable tourism development, the current reality of tourist housing in large cities merits particular interest. Given the limitations of this work, this phenomenon cannot be analysed in detail. On this issue, Flaquer Riutort (2025) is recommended reading.

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ARTICLE/ARTÍCULO

Proposal to Reform the Basque Electoral System

Propuesta de reforma del sistema electoral vasco

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ABSTRACT

Objective. To avoid the current discordances between votes and seats among political parties, this proposal introduces a more proportional allocation of seats to constituencies based on updated population figures and takes into account the total number of votes received by each party across the region. Method. The d'Hondt method is applied using a reduction of votes (continuosus threshold) to determine the total number of seats allocated to each party at the regional level. These seats are then distributed across constituencies using the biproportional apportionment method. Results. The proposed system eliminates discordances between votes and seats, provides a seat bonus to the winning party (enhancing governability) and increases the representativeness of the Basque Parliament by allowing more parties to gain representation. Conclusions. The current Basque electoral system generates discordances beetween votes and seats, as evidenced in the 1990, 2012 and 2024 elections. These are primarily due to the lack of proportional seat distribution among constituencies according to updated population figures and because the total votes of the parties are not taken into account for the total seats allocated to the parties.

KEYWORDS: 1990, 2012 and 2024 Basque Parliament elections; Basque electoral system; discordances; discontinuous threshold; continuous threshold; d'Hondt method; governability; biproportionality.

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RESUMEN

Objetivo Para evitar las actuales discordancias entre votos y escaños entre partidos se realizará previamente un reparto más proporcional de escaños a las circunscripciones según sus poblaciones actualizadas y se tendrán en cuenta los votos totales de los partidos. Método. Aplicaremos el método d'Hondt con una reducción de votos (barrera continua) a los partidos para obtener los escaños totales de cada partido a nivel global. Aplicaremos el método de biproporcionalidad para repartir los escaños totales de cada partido entre las circunscripciones. Resultados. Con nuestra propuesta se evitan discordancias entre votos y escaños, se prima al partido vencedor con más escaños (mejora de la gobernabilidad) y aumenta la representatividad del Parlamento Vasco (algún partido más obtendría representación). Conclusions. El actual sistema electoral vasco provoca discordancias entre votos y escaños entre partidos, tal y como ocurrió en las elecciones de 1990, 2012 y 2024. Esto se debe a que no se hace un reparto proporcional de escaños a las circunscripciones teniendo en cuenta sus poblaciones actualizadas y a que no se tienen en cuenta los votos totales de los partidos para los escaños totales a los partidos.

PALABRAS CLAVE: elecciones al Parlamento Vasco de 1990, 2010 y 2024; sistema electoral vasco; discordancias; barrera discontinua; barrera continua; método d'Hondt; gobernabilidad; biproporcionalidad.

1. Introduction

The Basque Parliament elections held in 1990, 2012 and 2024 have revealed that the current electoral system in the Basque Country generates discordances between the number of votes cast and the number of seats obtained. For example, in the most recent elections in 2024, the Elkarrekin Podemos – Green Alliance coalition received 23,679 votes, while Vox obtained 21,396. Despite this, the Elkarrekin Podemos – Green Alliance coalition failed to secure any representation, whereas Vox gained one seat. These discordances arise from two main factors: the failure to consider the total number of votes when allocating seats among parties, and the continued use of outdated legal population figures to determine the number of seats assigned to each electoral constituency. This leads to Álava being overrepresented in terms of seats, despite being the least populated constituency. Adjusting the number of seats per constituency in line with updated legal population figures would substantially reduce the likelihood of such discordances, although it would not eliminate them entirely. In addition, this article proposes that the total number of votes obtained by each party should be considered when calculating representation in the Basque Parliament. It is important to distinguish between discrepancy and disproportionality, as they are conceptually distinct. An electoral system may produce discordances while still being proportional, as is the case with the Basque system. This is due to the large

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district magnitude of its three constituencies – the larger the constituency, the more proportional the seat distribution among parties. Nonetheless, the Basque electoral system simultaneously produces discordances between votes and seats because seat distribution is carried out independently within each constituency. Such discordances occurred in the 1990, 2012 and 2024 elections, which are examined in this article.

Under the current system, a 3% threshold of valid votes (votes cast for party lists plus blank votes) is required to participate in the seat allocation process in each of the three constituencies. Achieving at least 3% of the vote in a given constituency therefore provides a strong likelihood of securing one of the 25 seats allocated to that district (Llera, 1998a). Indeed, in the most recent Basque regional elections held in 2024, Vox obtained a seat in Álava with just 3.71% of the vote, while Sumar also secured a seat with 3.69%. As such, reaching 4% of the vote in any given constituency effectively guarantees representation.

The primary objective of this article is to demonstrate that the discordances between votes and seats among political parties stem from two key issues: the absence of a more proportional allocation of seats across the three Basque constituencies based on updated population figures, and the failure to consider the total number of votes received by each party across the Basque Autonomous Community as a whole. To address this, we propose an alternative approach based on three core principles: using updated population figures for each constituency to ensure a more proportional distribution of seats among them; taking into account the total number of votes obtained by each party to allocate seats at the regional level by applying continuous thresholds of 1% and 3%; and finally, distributing the total number of seats obtained by each party among the constituencies through a biproportional method.

The theoretical framework includes a brief review of the existing literature, drawing on prior studies that have analysed the Spanish electoral system at both national and regional levels – including the Basque electoral system. The methodology section sets out our proposed approach, which consists of three main steps. First, seats are allocated more proportionally among the three constituencies in line with their updated populations. Second, the total number of votes received by each party is used to calculate their overall seat allocation, applying continuous thresholds of 1% and 3%. Third, a biproportional apportionment method is applied that simultaneously accounts for both the number of seats assigned to each constituency and the total number of seats awarded to each party. The results section illustrates how our biproportional apportionment proposal would have been applied to the Basque elections of 1990, 2012 and 2024, following the methodology outlined. Finally, the conclusions reaffirm the existence of discordances between votes and seats under the current Basque electoral system, and demonstrate how the proposed reform would eliminate such discordances while achieving a balance between representativeness and governability – favouring the most-voted parties.

2. Theoretical framework

The literature in political science and electoral sociology has long shown an interest in analysing the Spanish electoral system and its potential reform, both at the national level (Gambino, 2009; Lago and Lago, 2000; Montero, 1997; Montero and Riera, 2008, 2010; Oñate and Ocaña, 2000; Pallarés, 1981; Ramírez *et al*., 2013, pp. 29–73, 87–105; Riera, 2013; Vallès, 1986) and at the regional level (Delgado, 2011; Falcó and Verge, 2013; Gómez and Cabeza, 2013; Lagares and Oñate, 2019, pp. 165–187; Lago and Montero, 2004; Llera, 1998b, pp. 315–318; 2016a, pp. 27–63; 2016b, pp. 247–265; Libbrecht *et al*., 2011; Mancisidor, 1985; Montero and Font, 1991; Montero *et al*., 1992; Ortega and Oñate, 2019, pp. 205–224; Padró and Colomer, 1992; Pallarés, 1981, 1991, 1998, pp. 221–245; Schakel, 2011). Following the regional pacts reached during Spain's transition to democracy between the UCD and the PSOE, there emerged a strong interest in generalising, standardising or extrapolating the electoral system used for the Congress of Deputies to the various regional electoral systems (Ortega and Oñate, 2019, pp. 205–224; Vallès, 1988). As a result, most autonomous communities have either adopted or drawn significant inspiration from the national legislation established by the Spanish Constitution and, more specifically, from the Organic Law of the General Electoral System (LOREG) of 1985 (Llera, 1998a). The Basque electoral system, in particular, replicates key features of the 1985 LOREG – such as defining electoral districts in accordance with the three existing Basque provinces (Álava, Gipuzkoa and Bizkaia); applying the d'Hondt method of proportional representation to allocate seats independently within each constituency; using closed and blocked lists; and establishing a 3% electoral threshold in each constituency to participate in the distribution of seats (Ortega and Oñate, 2019, pp. 205–224; Act 5/1990 of 15 June on Basque Parliamentary Elections).

The 1985 LOREG does not define an ideal size for regional parliaments; rather, each autonomous community determines the size of its legislature based on budgetary, political or historical considerations, with limited regard for demographic or proportionality criteria (Baras and Botella, 1996, pp. 128–143; Jaráiz and Castro, 2022, pp. 38–56; Llera, 1998a; Nohlen, 1981, pp. 106–112; Ortega and Oñate, 2019, pp. 205–224; Ortega and Trujillo, 2022, pp. 251–262). Once the overall size of the parliament has been established, it becomes equally important to define the size of electoral districts or constituencies, given the political consequences such decisions may have on electoral outcomes (Baras and Botella, 1996, pp. 128–143; Jaráiz and Castro, 2022, pp. 38–56; Lijphart, 1990; Nohlen, 1981, pp. 106–112; 2004, pp. 92–134; Ortega and Trujillo, 2022, pp. 251–262; Taagepera and Shugart, 1989, pp. 61–141). In other words, the size or magnitude of constituencies may be a primary source of inequality and disproportionality, as small- and medium-sized constituencies tend to favour the dominant parties (Jaráiz and Castro, 2022, pp. 38–56; Llera, 1998b, pp. 315–318; 2016a, pp. 27–63; 2016b, pp. 247–265; Montero, Llera and Torcal, 1992; Nohlen, 1983; 2004, pp. 92–134; Ortega and Oñate, 2019, pp. 205–224; Ortega and Trujillo, 2022, pp. 251–262; Taagepera and Shugart, 1989, pp. 61–141). In both the Spanish and Basque electoral systems, the constituencies are multi-member districts (i.e. each elects more than one representative), which coincide with the

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existing provincial boundaries. In the case of the Basque Parliament, 25 seats are allocated to each of the three constituencies, irrespective of their updated legal populations. This allocation is based purely on historical and political convention, rather than on demographic criteria (Baras and Botella, 1996, pp. 128–143; Llera, 1998a; 1998b, pp. 315–318; 2016a, pp. 27–63; 2016b, pp. 247–265; Nohlen, 1981, pp. 106–112; Taagepera and Shugart, 1989, pp. 61–141). Indeed, according to the most recent legal population figures from 2023 – which should have been taken into account for the 2024 Basque elections – Álava had a population of 336,686, compared to 1,154,306 in Bizkaia. In other words, Bizkaia had a population 3.43 times greater than that of Álava, yet both constituencies were assigned an equal number of seats – 25 – based on political and historical rather than population-based criteria. The distribution of seats among the three constituencies is therefore not proportional. However, the allocation of seats to parties within each constituency is proportional, as it is carried out using the d'Hondt method. Although this is a proportional representation system, it tends to favour larger parties, penalising both party system fragmentation and smaller parties (López, 2015; Laakso and Taagepera, 1979; Llera, 2016a, pp. 27–63; 2016b, pp. 247–265; 2016, pp. 247-265; Nohlen, 1981, pp. 127–141; Ortega and Oñate, 2019, pp. 205–224; Ramírez *et al.*, 2013, pp. 29–73, 87–105; Sartori, 1999, pp. 149–157; Taagepera and Shugart, 1989, pp. 61–141). As Llera (1998a) argues, the calculation of constituency size is the principal source of distortion in voting equality and proportionality, as it can result in constituencies being either under- or overrepresented in terms of seat allocation relative to their populations – precisely the case in Basque parliamentary elections. This generates significant disparities in the weight of individual votes depending on the constituency in which they are cast. In the Basque Country, for example, the vote of a citizen in Álava carries significantly more value than that of a citizen in Gipuzkoa. No autonomous community in Spain allocates seats to constituencies in proportion to updated population quotas. This is often because constituencies are initially assigned an excessive number of seats, or because allocations are based on purely political agreements or conventions, with no reference to legal population figures, as occurs in the Basque Country (García, 2004; Llera, 1998a). This, combined with the independent allocation of seats to parties within each constituency, may lead to – and indeed has led to – discordances between votes and seats in various regional elections, including those held in the Basque Country.

The larger the size of the constituencies, the more proportional the allocation of seats will be when a proportional electoral formula is applied, such as the Sainte-Laguë or d'Hondt method, among others. The Basque electoral system has the advantage of being highly proportional, as it assigns a substantial number of seats to each of its three constituencies, irrespective of their population size. Although this equal allocation of seats – without considering population – may initially appear somewhat unjust, it nevertheless encourages proportional outcomes owing to the large size of the constituencies. In each constituency, any party that surpasses the legal threshold of 3% is eligible to obtain at least one seat. This makes the Basque electoral system highly proportional, but simultaneously prone to generating discordances between votes and seats across political parties

(López, 2015). However, this 3% legal threshold has limited practical significance in the Basque context, as it is highly unlikely that a party receiving less than 3% of the vote would secure representation under the d'Hondt method, which tends to disadvantage smaller parties. Given that the d'Hondt method is a proportional system that favours larger parties while penalising both fragmentation and smaller parties, its true corrective mechanism lies in constituency magnitude. The greater the magnitude of the constituencies, the stronger the corrective effect of the d'Hondt method. In other words, the disproportional effects typically associated with applying the d'Hondt formula in small- or medium-sized constituencies are significantly mitigated in the context of regional elections, where constituencies tend to be larger than in general elections (Gallagher, 1991; Llera, 1998b, pp. 315–318; Lijphart, 1985; Montero, 1992; Montero, Llera and Torcal, 1992; Nohlen, 1981, pp. 127–141; Ortega and Oñate, 2019, pp. 205–224; Taagepera and Shugart, 1989, pp. 61–141). The Basque electoral system is thus highly proportional due to the large magnitude of its constituencies, yet at the same time it is particularly susceptible to producing discordances, as evidenced in the elections of 1990, 2012 and 2024, in which parties receiving more votes than others failed to obtain representation. It is important to emphasise that the concepts of proportionality and vote–seat discordances must not be conflated, as they are distinct and may coexist within the same electoral system – as is the case with the Basque system. An electoral system such as that of the Basque Country may generate discordances while maintaining a high degree of proportionality, owing to the large size of its constituencies. The greater the constituency magnitude, the more proportional the seat distribution among parties. Nevertheless, the Basque electoral system simultaneously produces discordances between votes and seats because seat distribution is carried out independently within each constituency. This article analyses three regional elections – 1990, 2012 and 2024 – where such discordances between votes and seats occurred.

Currently, in their respective regional elections, autonomous communities use the d'Hondt method to allocate seats to parties independently within each constituency. The majority of these communities apply a 3% electoral threshold, following the general framework established by the 1985 LOREG (Baras and Botella, 1996, pp. 128–143; Jaráiz and Castro, 2022, pp. 38–56; Llera, 1998a; 1998b, pp. 315–318; Nohlen, 1981, pp. 127–141; Ortega and Trujillo, 2022, pp. 251–262; Sartori, 1999, pp. 149–157; Taagepera and Shugart, 1989, pp. 61–141). However, certain autonomous communities, such as Madrid and the Valencian Community, impose a higher threshold of 5% of valid votes to qualify for seat allocation. Although the Valencian Community comprises three provinces, this 5% threshold is applied to the total valid votes cast at the regional level, while the actual distribution of seats to parties is still carried out independently within each constituency – as is also the case in other autonomous communities with more than one constituency. This arrangement is relatively uncommon, since in most other multi-provincial autonomous communities the general rules laid out in the LOREG prevail: a 3% threshold of valid votes (i.e. votes for party lists plus blank votes) applied within each constituency when allocating seats to parties independently across constituencies.

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3. Methodology

This study focuses on the Basque Parliament elections of 1990, 2012 and 2024, all of which exhibited discordances between votes and seats among political parties. We propose an alternative method for the allocation of seats to constituencies, as the current approach is one of the key factors contributing to such discordances. Our proposal involves assigning one initial seat to each constituency, with the remaining seats distributed as follows: half of the remaining seats are allocated in proportion to the updated legal population, and the other half according to the square root of each constituency's updated legal population. Fractions are rounded using the Sainte-Laguë method (López, 2015; Grimmett *et al.*, 2017; Ramírez *et al.*, 2013, pp. 29–73, 87–105). A factor *k* must be calculated such that:

$$H = \sum_{i=1}^{n} \left[k \left(\frac{p_i}{\sum p_i} x \frac{H}{2} + \frac{\sqrt{p_i}}{\sum \sqrt{p_i}} x \frac{H}{2} \right) + 1 \right]_w$$

Where *H* is the total number of seats to be distributed in the autonomous community, and *pi* is the legal population of the constituency *i*. This factor *k* is then used to calculate the size *hi* of constituency *i* as follows:

$$h_i = \left[k \left(\frac{p_i}{\sum p_i} x \frac{H}{2} + \frac{\sqrt{p_i}}{\sum \sqrt{p_i}} x \frac{H}{2} \right) + 1 \right]_w$$

Under this system, each constituency receives at least one seat, regardless of population size. Smaller constituencies receive a slight advantage in terms of seat allocation, while larger constituencies are slightly underrepresented relative to their population. However, this marginal deviation from proportionality does not affect the allocation of seats to parties, as that process is based on their total number of votes. As a result, no discordances can arise between total votes and seats at the party level. Finally, we apply the biproportional apportionment method to distribute each party's seats among the three electoral constituencies (Álava, Gipuzkoa and Bizkaia).

To determine the overall representation of parties in the 1990, 2012 and 2024 Basque elections, we introduce a continuous threshold of 1% and 3%, calculated as 1% and 3% of the total votes cast for party lists, rounded to the nearest whole number (Ramírez *et al.*, 2013, pp. 29–73, 87–105). This threshold is then subtracted from each party's total number of votes, producing a reduced vote count. Parties that do not reach the 1% or 3% threshold of total valid votes are reduced to zero and are thus excluded from seat allocation. Those that do surpass the threshold are included in the apportionment process; however, this does not guarantee the allocation of seats, as distribution is based on each party's reduced

vote total, using the d'Hondt method. In many cases, after this reduction, the remaining vote totals are too low to yield a seat. It is important to note that the d'Hondt method – without the need for any formal percentage threshold – already discourages fragmentation, penalises smaller parties and favours larger ones (López, 2015; García, 2004; Llera, 2016a, pp. 27–63; 2016b, pp. 247–265; Nohlen, 1981, pp. 127–141; Ortega and Oñate, 2019, pp. 205–224; Ramírez *et al.*, 2013, pp. 29–73, 87–105; Sartori, 1999, pp. 149–157).

In most cases, constituency sizes are determined on the basis of population, typically granting smaller constituencies a slight advantage through the allocation of initial seats. Seat allocation to parties should be based on their total number of votes, with a modest advantage granted to the most-voted parties in order to avoid excessive parliamentary fragmentation and to ensure a minimum degree of governability (López, 2015; Llera, 2016a, pp. 27–63; 2016b, pp. 247–265; Márquez and Ramírez, 1998; Ramírez *et al.*, 2013, pp. 29–73, 87–105; Ramírez and Márquez, 2010; Sartori, 1999, pp. 149–157). When constituency sizes are determined according to population figures, and party representation is based on total vote counts, the resulting problem is one of apportionment: how to distribute each party's total number of seats across constituencies in such a way that each receives the predetermined number of seats. This is a matrix apportionment problem with constraints both on rows and columns – commonly referred to as a double-constraint problem (López, 2015; Gassner, 1991; Maier, 2006, pp. 105–116; Maier *et al.*, 2010; Ramírez *et al.*, 2013, pp. 29–73, 87–105).

Using the Sainte-Laguë method, it is relatively straightforward to distribute each party's seats across constituencies in proportion to the number of votes obtained: it is sufficient to compute an appropriate divisor for each party and round the resulting fractions to the nearest integer. However, this method does not guarantee that each constituency will receive the correct number of seats as determined by its size. Nor does it ensure that each party receives its exact total number of seats.

In this context, we know the number of votes each party obtained in each constituency, as well as the total number of seats that must be allocated to each party and to each constituency. What remains is to calculate the number of seats each party should receive in each constituency. If seats are allocated by rows – that is, by constituency, as is traditionally done – the row marginals (i.e. total seats per constituency, as shown in the final column) are respected, but there is no guarantee that the column marginals (total seats per party) will be satisfied. Conversely, if seats are allocated by columns – distributing each party's seats among constituencies according to its vote shares across constituencies – the column marginals will be satisfied, but the row marginals may not be. Row-wise allocation (by constituency) involves applying an adjustment factor to each row and rounding according to a specific rule. Column-wise allocation (by party) applies the adjustment factor to each column. The principle of biproportionality involves simultaneously applying adjustment factors to both

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the rows and columns of the vote matrix, such that, after rounding using the chosen method (e.g. Sainte-Laguë), the resulting seat matrix satisfies both sets of marginal constraints – by constituency and by party (Gassner, 1991; Maier, 2006, pp. 105–116; Maier *et al.*, 2010; Ramírez *et al.*, 2013, pp. 29–73, 87–105). To implement biproportional apportionment, the votes of all parties across all constituencies are organised into a rectangular matrix. The rows and columns of this matrix are then simultaneously scaled by appropriate adjustment factors, such that rounding with Sainte-Laguë (or another designated method) yields a distribution of seats that satisfies both the constituency-level and party-level constraints (Gassner, 1991; Maier, 2006, pp. 105–116; Maier *et al.*, 2010; Ramírez *et al.*, 2013, pp. 29–73, 87–105).

4. Results: Biproportionality with continuous thresholds of 1% and 3%

In the Basque Country, the allocation of the 75 seats in the Basque Parliament among the three constituencies is not based on proportionality according to population (García, 2004; Llera, 1998a; 1998b, pp. 315–318; 2016a, pp. 27–63; 2016b, pp. 247–265). Instead, seat distribution is determined by a purely political and historical agreement, as established in Article 10, Title II of the 1990 Basque Parliamentary Elections Act, which assigns 25 seats to each of the three constituencies. This arrangement results in significant disparities: Álava is markedly overrepresented, currently holding 25 seats despite its population share entitling it to fewer than half that number. Conversely, Bizkaia is substantially underrepresented, receiving only 25 seats when, based on its current population, it should be allocated considerably more (see the third column of Tables 1, 2 and 3). As outlined in the methodology section, our proposed model assigns one initial seat to each constituency. The remaining seats are then distributed in two stages: half (36 seats) are allocated in proportion to the updated legal population using the Sainte-Laguë method; and the other half (36 seats) are distributed according to the square root of each constituency's updated population. This dual-criterion approach results in a slight overrepresentation of less-populated constituencies such as Álava, and a slight underrepresentation of more populous constituencies such as Gipuzkoa. Applying this method to the Basque Parliament elections of 1990, 2012 and 2024 yields the proposed distributions shown in the fourth column of Tables 1, 2 and 3, respectively.

Table 1
Seats by constituency

Basque Parliament elections, 1990

Constituency	Population	Population share	Seats	
			Proposed	Actual
Bizkaia	1,170,594	41.28	37	25
Gipuzkoa	685,181	24.16	25	25
Álava	271,238	9.56	13	25
total	2,127,013	75.00	75	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Table 2
Seats by constituency

Basque Parliament elections, 2012

Constituency	Population	Population share	Seats	
			Proposed	Actual
Bizkaia	1,155,772	39.68	36	25
Gipuzkoa	709,607	24.36	25	25
Álava	319,227	10.96	14	25
total	2,184,606	75.00	75	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Table 3
Seats by constituency

Basque Parliament elections, 2024

Constituency	Population	Population share	Seats	
			Proposed	Actual
Bizkaia	1,154,306	39.01	35	25
Gipuzkoa	728,027	24.61	25	25
Álava	336,686	11.38	15	25
total	2,219,019	75.00	75	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

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The current non-proportional allocation of seats among constituencies is one of the primary factors contributing to discordances between votes and seats across political parties. A further contributing factor is the practice of allocating seats to parties independently within each constituency, without accounting for their total vote share at the regional level. Clear instances of vote–seat discordances are evident in all three elections analysed: 1990, 2012 and 2024. In the 1990 election, a significant discrepancy occurred between Alavese Unity, which secured three seats with 14,351 votes, and United Left–Greens, which, despite receiving 14,440 votes, failed to obtain any representation (see fourth column of Table 4). In the 2012 election, Union, Progress and Democracy won one seat with 21,539 votes, whereas United Left, with 30,318 votes, remained unrepresented (see fourth column of Table 5). Similarly, in the most recent election held in 2024, Vox secured one seat with 21,396 votes, while Elkarrekin, despite receiving 23,679 votes, did not obtain representation (see fourth column of Table 6).

Among the three provinces, Álava has the weakest tradition of Basque nationalist voting. Its overrepresentation has resulted in an electoral advantage for state-wide parties such as Vox in the 2024 election (Table 6). Conversely, Bizkaia, which has historically exhibited stronger support for Basque nationalist parties, is underrepresented – leading to a slight underrepresentation of Basque nationalist parties overall (López, 2015; Ibarra and Ahedo, 2004; Jaráiz and Castro, 2022, pp. 38–56; Lagares and Oñate, 2019, pp. 165–187; Llera, 2016a, pp. 27–63; 2016b, pp. 247–265; Ortega and Trujillo, 2022, pp. 251–262; Rivera *et al.*, 2019, pp. 299–317). A more proportional distribution of seats among the constituencies would have prevented the vote–seat discordances observed in the 2012 and 2024 elections, as shown in the fifth column of Tables 5 and 6. However, a proportional allocation of seats based on population does not necessarily eliminate the possibility of such discordances. While it reduces the likelihood of inconsistencies between votes and seats, it does not rule them out entirely. Indeed, the 1990 election demonstrates that accounting for updated legal population figures alone is insufficient to eliminate these mismatches. Under a proportional distribution model, Alavese Unity would have received only one seat instead of three – thereby reducing, but not eliminating, the discrepancy (see fourth and fifth columns of Table 4).

The current Basque electoral law applies the d'Hondt method independently within each constituency, together with a classic discontinuous threshold of 3% of valid votes, calculated separately for each constituency. This classic discontinuous threshold entails excluding from the seat allocation process all parties that do not reach at least 3% of valid votes (i.e. votes cast for party lists plus blank ballots) within a given constituency. Under this system, a party that reaches the 3% threshold becomes eligible to participate in the seat distribution, although this does not guarantee that it will obtain a seat. Conversely, a party falling short of the 3% threshold by even a single vote is excluded from the distribution of seats, even in cases where its vote share could potentially entitle it to representation.

One way to avoid such discontinuities in seat allocation would be to implement a continuous threshold based on a pre-established percentage. A continuous threshold entails applying an equal vote reduction to all parties, calculated as a set percentage of the total number of votes cast for party lists. Taking the most recent 2024 elections as an example, applying a 1% reduction to the total number of votes cast for party lists results in a deduction of 10,522 votes, while a 3% reduction corresponds to 31,565 votes. With a 1% continuous threshold, this amount is subtracted from each party's total number of votes. Consequently, parties with fewer than 10,522 votes would be reduced to zero and excluded from the allocation process. Likewise, with a 3% continuous threshold, any party with fewer than 31,565 votes would be excluded, as its adjusted vote count would fall to zero. This same approach can be applied to the two other elections analysed – those held in 1990 and 2012. In addition to eliminating discontinuities in seat allocation, continuous thresholds can, in some cases, enable an additional party to obtain representation and provide the winning party with a seat bonus – contributing to improved governability and political stability (Márquez and Ramírez, 1998; Ortega and Oñate, 2019, pp. 205–224; Ramírez *et al.*, 2013, pp. 29–73, 87–105; Ramírez and Márquez, 2010).

In short, taking into account each party's total number of votes and applying a continuous threshold of 1% or 3% would help to prevent discordances between votes and seats among parties, enhance governability (by favouring the winning and most-voted parties) and improve representativeness (by allowing additional parties to gain seats). If a 1% continuous threshold were applied in the 2024 elections, the winning party (the Basque Nationalist Party [PNV]) would receive a bonus of two additional seats compared to the actual results, and one additional party (Elkarrekin) would gain representation with one seat – as shown in the penultimate column of Table 6. If a 3% continuous threshold were applied, the PNV would receive a larger bonus of four additional seats, but neither the Sumar alliance nor Elkarrekin would obtain representation (see final column of Table 6). Thus, the higher the continuous threshold applied, the greater the bonus to the winning and most-voted parties, and the fewer the number of parties represented, thereby reducing party system fragmentation and promoting governability.

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Table 4

Seat allocation to parties with constituency sizes proportional to population and continuous thresholds of 1% and 3%

Basque Parliament elections, 1990

Party	Votes	Population share	Seats			
			Actual	Updated population	1% threshold	3% threshold
PNV	289,701	21.21	22	24	24	26
PSE/PSOE	202,736	14.84	16	16	16	17
HB	186,410	13.65	13	14	15	15
EA	115,703	8.47	9	9	9	8
PP	83,719	6.13	6	5	6	5
EE	79,105	5.79	6	6	5	4
EB	14,440	1.06				
UA	14,351	1.05	3	1		
Other	38,134	2.79				
Total	1,024,299	75.00	75	75	75	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Table 5

Seat allocation to parties with constituency sizes proportional to population and continuous thresholds of 1% and 3%

Basque Parliament elections, 2012

Party	Votes	Population share	Seats			
			Actual	Updated population	1% threshold	3% threshold
PNV	384,766	25.62	27	29	29	31
EH Bildu	277,923	18.51	21	21	21	21
PSE-EE	212,809	14.17	16	15	15	15
PP	130,584	8.69	10	9	9	8
IU-UP	30,318	2.02		1	1	
UPD	21,539	1.43	1			
Other	68,461	4.56				
Total	1,126,400	75.00	75	75	75	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Table 6

Seat allocation to parties with constituency sizes proportional to population and continuous thresholds of 1% and 3%

Basque Parliament elections, 2024

Party	Votes	Population share	Seats			
			Actual	Updated population	1% threshold	3% threshold
PNV	370,554	26.41	27	29	29	31
EH Bildu	341,735	24.36	27	27	26	28
PSE-EE	149,660	10.67	12	12	11	10
PP	97,149	6.92	7	6	7	6
Sumar	35,092	2.50	1	1	1	
Elkarrekin	23,679	1.69			1	
Vox	21,396	1.53	1			
Other	12,905	0.92				
	1,052,170	75.00	75	75	75	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Once the total number of seats allocated to each party has been determined, the next step is to distribute these total seats among the constituencies through a biproportional apportionment process. This type of apportionment addresses the matrix allocation problem, in which row marginals (seats assigned to constituencies, shown in the final column of Tables 7–12) and column marginals (seats assigned to parties, shown in the final row of Tables 7–12) must be simultaneously satisfied. In other words, we know the number of votes each party has obtained in each constituency, the total number of seats each party is entitled to and the number of seats to be assigned to each constituency as previously calculated. What remains is to determine how many seats each party should receive in each constituency.

If allocation is carried out row by row – that is, for each constituency – the row marginals (final column of Tables 7–12) will be satisfied. However, there is no guarantee that the column marginals (total seats per party, final row of Tables 7–12) will also be satisfied. Conversely, if allocation is performed column by column – distributing each party's total seats across constituencies in accordance with its vote distribution – the column marginals (final row of Tables 7–12) are guaranteed, but the row marginals may not be. Row-based allocations involve applying an adjustment factor to each row and rounding according to the selected electoral method.

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Biproportionality consists in applying adjustment factors simultaneously to both the rows and the columns of the vote matrix such that, after rounding according to the chosen method, both the row and column totals match the predetermined marginals. In our case, the Sainte-Laguë method has been selected to carry out the biproportional apportionment. To implement this, the votes received by all parties across all constituencies are arranged in a rectangular matrix. The rows and columns of this matrix are then simultaneously multiplied by appropriate adjustment factors so that, when the resulting values are rounded using the Sainte-Laguë method (or any other designated method), the constraints for both constituencies and parties are met (see Tables 7–12). Similarly, in column-wise allocations, the adjustment factor is applied to each column. A feasible solution is guaranteed in cases where the vote matrix contains no zeros, as demonstrated by Balinski and Demange (1989a, 1989b). To obtain this solution, specialised software is required, as it cannot be computed using a standard calculator or spreadsheet. For this study, we used the software BAZI, developed by Maier and Pukelsheim (2007), to perform the biproportional apportionment.

Table 7

Biproportional apportionment with a continuous threshold of 1%

Basque Parliament elections, 1990

	PNV	PSE	HB	EA	PP	EE	Total
Bizkaia	14	8	7	3	3	2	37
Gipuzkoa	6	5	6	5	1	2	25
Álava	4	3	2	1	2	1	13
Total	24	16	15	9	6	5	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Table 8

Biproportional apportionment with a continuous threshold of 3%

Basque Parliament elections, 1990

	PNV	PSE	HB	EA	PP	EE	Total
Bizkaia	15	8	6	3	3	2	37
Gipuzkoa	7	5	7	4	1	1	25
Álava	4	4	2	1	1	1	13
Total	26	17	15	8	5	4	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Table 9

Biproportional apportionment with a continuous threshold of 1%

Basque Parliament elections, 2012

	PNV	EH Bildu	PSE-EE	PP	IU-UP	Total
Bizkaia	16	8	7	4	1	36
Gipuzkoa	9	9	5	2		25
Álava	4	4	3	3		14
Total	29	21	15	9	1	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Table 10

Biproportional apportionment with a continuous threshold of 3%

Basque Parliament elections, 2012

	PNV	EH Bildu	PSE-EE	PP	Total
Bizkaia	17	8	7	4	36
Gipuzkoa	9	9	5	2	25
Álava	5	4	3	2	14
Total	31	21	15	8	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Table 11

Biproportional apportionment with a continuous threshold of 1%

Basque Parliament elections, 2024

	PNV	EH Bildu	PSE-EE	PP	Sumar	Elkarre.	Total
Bizkaia	15	10	5	3	1	1	35
Gipuzkoa	9	11	3	2			25
Álava	5	5	3	2			15
Total	29	26	11	7	1	1	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

Table 12

Biproportional apportionment with a continuous threshold of 3%

Basque Parliament elections, 2024

	PNV	EH Bildu	PSE-EE	PP	Total
Bizkaia	16	11	5	3	35
Gipuzkoa	10	11	3	1	25
Álava	5	6	2	2	15
Total	31	28	10	6	75

Source: own research based on www.euskadi.eus/elecciones and www.ine.es.

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5. Conclusions

It is not reasonable for discordances to occur between votes and seats whereby a party with more votes than another obtains fewer seats or is even left without representation, as has happened in the three elections analysed here: 1990, 2012 and 2024. Such discordances could also occur again in future elections. It would be more reasonable for a party with more votes than another not to be left without representation or to obtain more seats than parties with fewer votes. However, due to historical and political conventions that are difficult to change, implementing our proposed reform of the Basque electoral system would be complex. Paradoxically, the Basque electoral system in its current form favours state-wide parties over nationalist parties, because Álava is overrepresented in terms of seats relative to its population. This province has historically been less nationalist, although in recent years it has shown a tendency towards more Basque-nationalist positions (Lagares and Oñate, 2019, pp. 165–187; Llera, 2016a, pp. 27–63; 2016b, pp. 247–265; Rivera *et al.*, 2019, pp. 299–317). In fact, in the most recent Basque regional elections of 2024, EH Bildu was the most voted force in the province of Álava, even ahead of the PNV. This represents a significant historical shift in Basque-nationalist voting behaviour in this province. Nevertheless, it should be noted that discordances in Basque elections are not primarily driven by the more or less Basque-nationalist evolution of the vote in Álava – although this factor also plays a role – but rather by the failure to take into account the updated legal population of each of the three constituencies when allocating seats among them. To avoid discordances between votes and seats among parties, regardless of constituency size, it would be sufficient to take into account parties' total votes, even if a final distribution of seats among the three constituencies were subsequently carried out using a biproportional method. In this article, we do not propose a fully proportional allocation of seats among constituencies, but rather one that is more proportional than the current system, which assigns 25 seats to each constituency based on purely historical and political agreement. Our proposal grants one initial seat to each constituency and applies the square root of each constituency's population to allocate part of the remaining seats. This results in a slight overrepresentation of smaller constituencies (Álava) and a slight underrepresentation of larger constituencies (Gipuzkoa). This somewhat more proportional allocation – though not fully proportional – reduces the likelihood of discordances, but does not eliminate them entirely. Indeed, when applying our proposed seat allocation among the three constituencies to the 1990 Basque elections, a minor discrepancy still occurred involving Alavese Unity (Table 4), although it was smaller than the discrepancy observed under the actual results. Álava has, without doubt, experienced a significant evolution in its electoral behaviour towards more Basque-nationalist positions. Nevertheless, in Álava, minor state-wide parties such as Vox or Sumar have obtained representation in the Basque Parliament, as occurred, for example, in the most recent elections of 2024.

Determining the size of constituencies based on a seat allocation proportional to their population reduces the likelihood of discordances but does not eliminate them entirely unless seats are allocated to parties based on their total number of votes received. Independent seat allocations in regional elections in autonomous communities with more than one constituency have, on several occasions, led to mismatches between vote shares and seat shares, as observed in the Basque Parliament elections of 1990, 2012 and 2024. The probability of vote–seat discordances increases when seats are not allocated to constituencies in proportion to their population – at least partially. Some autonomous communities assign a fixed initial number of seats to each constituency, ranging from one to several seats, depending on the electoral system in place. The remaining seats are then distributed in proportion to the population. This is known as the linear method, where the constant is the number of initial seats. In contrast, other autonomous communities allocate seats across constituencies based on purely political agreements, without applying any population-based proportionality criteria, as is the case in the Basque Country.

Improving representativeness – by allowing an additional party to obtain representation (thereby increasing fragmentation) – is by no means incompatible with enhancing governability and stability. The central aim of this article is precisely to demonstrate that representativeness and governability are compatible and can be achieved simultaneously. As shown in Tables 4, 5 and 6, by applying a simple continuous threshold of 1%, the winning party (PNV) would receive a greater seat bonus, while at least one additional party would also gain representation. Moreover, vote–seat discordances would be avoided, provided that the total number of votes obtained by each party is taken into account. Evidently, the higher the continuous threshold applied, the greater the seat bonus awarded to the winning party and the major parties, thereby improving governability. At the same time, the number of parties gaining representation would be reduced, thus lowering fragmentation.

We reach the main conclusion that if party seat allocation were based on a distribution of seats to constituencies that is fully or partially proportional to their populations, the likelihood of vote–seat discordances would be significantly reduced – although not entirely eliminated. However, with our proposed biproportional apportionment method, vote–seat discordances would be eliminated altogether, since the total number of votes received by each party is taken into account, regardless of whether seat distribution across constituencies is proportional or not. In addition to eliminating discordances, in the three elections analysed (1990, 2012 and 2024), the winning party (PNV) would have obtained a bonus of several seats, and at least one more party would have gained representation – receiving at least one seat – under the continuous 1% threshold. In short, our proposal would eliminate discordances between votes and seats, enhance governability (by awarding a bonus to the winning party and the most-voted parties) and improve representativeness (by enabling at least one more party to gain representation).

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RESEARCH NOTE/NOTA DE INVESTIGACIÓN

The Family Socialisation of Adolescents in Andalusia: A Category System for Analysing Parental Discourse

La percepción de los progenitores sobre la socialización familiar de los/as adolescentes en Andalucía: un sistema de categorías para el análisis del discurso

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ABSTRACT

This article presents a category system developed as an instrument for analysing qualitative data produced during research on family socialisation of adolescents in Andalusia. The research employs qualitative methodology with interviews involving parents, adolescents and experts from disciplines related to adolescence. The category system accounts for household and family types, social class, and adolescent age and gender. Results demonstrate that this system can serve as a useful analytical tool for future research seeking to understand adolescent socialisation within the parental life context.

KEYWORDS: socialisation; adolescence; category system; parental; discourses.

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RESUMEN

Este artículo presenta un sistema de categorías elaborado como instrumento para el análisis de la información cualitativa producida en el marco de una investigación que estudia la socialización familiar de los adolescentes en Andalucía. Para el acercamiento a estas realidades se emplea una metodología cualitativa con entrevistas a progenitores, adolescentes y expertos en diferentes disciplinas vinculadas con la adolescencia. Para la realización del sistema de categorías se han tenido en cuenta los tipos de hogares y familias, la clase social, y la edad y el género de los adolescentes. Los resultados muestran que para comprender la socialización de los/as adolescentes en el contexto vital de sus progenitores este sistema de categorías puede resultar útil como herramienta de análisis para futuras investigaciones.

PALABRAS CLAVE: socialización; adolescencia; sistema de categorías; parental; discursos.

1. Introduction

This research examines how Andalusian families experience the socialisation stage of their adolescent children. Based on a qualitative perspective, it contextualises adolescent socialisation at home through a broad approach encompassing the digital society, risk society, family change, work–life balance and family participation in education. This article contextualises adolescence from a sociological perspective and presents a category system developed to serve as a methodological tool for future research on adolescence and families.

Adolescence as a process (Hurrelmann and Quenzel, 2018) is a socially and psychologically complex experience (Martin, 1996) lived differently by young people from various social backgrounds (Billarri *et al.*, 2019; Chaves and Nunes, 2011; Hitlin and Johnson, 2015). Traditionally described as an identity-building process in which the peer group takes centre stage, often in conflict with parental education (Albarello *et al.*, 2018; Fang, Galambos and Johnson, 2021), this stage is marked by identity affirmation, symbolic violence, hierarchical positioning and concern for popularity.

Adolescent reality cannot be separated from the digital society in which it unfolds, with the inherent risks and opportunities it presents. The key role played by relationship, information and communication technologies (RICTs) in adolescent life is well established (Bernal-Meneses *et al.*, 2019; Ortí *et al.*, 2025), serving as a space where young people are able to express their identity. However, recent research warns of unintended consequences of hyperconnectivity, including cyberbullying, mental health problems, internet or video game addiction and exposure to pornography, among others (Sudarto and Rizqi, 2024; Ayllón-Salas

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et al., 2024; Varshakumar, 2023). In the domestic sphere, RICTs represent one of the greatest sources of intergenerational conflict (Sanmartín *et al.*, 2025)..

Adolescence is also framed within the risk society (Beck, 1992). The issue of adolescents and their risky behaviours has been, and continues to be, a constant in social research (Ciranka and Van den Bos, 2021).

Although news coverage tends to sensationalise and emphasise the worst aspects of reality (Thorbjørnsrud and Figenschou, 2022), recent reports, statistics and research in Spain warn of concerning developments: increases in mental health problems, self-harm (Mancebo, 2022) and eating disorders (EDs) appear with growing frequency. Exposure to idealised images disseminated through social networks causes body dissatisfaction that impacts eating habits. EDs are increasingly prevalent in the adolescent population, with between 11% and 27% of adolescents in Spain presenting risk behaviours for developing these disorders, most commonly anorexia and bulimia (Ruiz, 2024). Faced with this situation, only 12% of parents in 2022 reported feeling prepared to address their children's digital education (García *et al.*, 2022).

Given this scenario, our research adopts a qualitative approach to examine whether families are prepared to face the challenge of educating their children in healthy social behaviours and attitudes (Martín-Lagos and Luque, 2020; Sánchez and Romero, 2021) and to understand parental discourse regarding adolescent socialisation through everyday practices and strategies in Andalusia, creating a category system to facilitate this analysis. The sociology of parental education and psychology have examined the impact of educational styles (González and De Pedro, 2023; Suárez-Valenzuela and Suárez, 2023); however, few studies analyse how mothers and fathers construct these educational styles through their interactions. Our aim is to open the "black box" of parental educational styles to better understand how they educate their adolescents.

This reality is also contextualised within family change. Elements to consider include the diversity of existing households (homoparental, homomarental, single-parent, blended couples, shared custody, among others) that coexist with the nuclear family composed of two parents of different sexes (Palacio, 2020; Pérez and Moreno, 2021). For example, according to Statistics on Annulments, Separations and Divorces (Spanish Institute of Statistics – INE), in Spain shared custody arrangements (48.4%) exceeded exclusive maternal arrangements (47.8%) in 2023. Other characteristics relate to values. Contemporary families are increasingly tolerant, secularised and open to new interpretations of family reality, although in Mediterranean countries they coexist with a high degree of cultural familiarity (Ayuso, 2019).

Our perspective also examines daily home life alongside parents' working life. This approach sheds light on the reality Hochschild and Manchung (2012) describe as the "second shift" – when the workday ends, caregiving and unpaid domestic work begin. Combining research on adolescents with their parents' situation is vital to understanding the process.

Finally, we turn to changes in educational styles. Since the 1990s, the sociology of education has noted an intensification of care in families. Hays (1996) particularly alluded to intensive motherhood, in which the mother focuses on child-rearing, acts as an expert guide and becomes emotionally absorbed by this intensive work. These mothers' expectations are framed by a vision of their children as vulnerable, innocent and at risk from numerous hazards. Later, Anette Lareau (2011) referred to "concerted cultivation", focused on cultivating children through numerous activities. Skelton and Francis (2012) continued this line with the concept of the "Renaissance Child", describing children enrolled in numerous extracurricular activities. Parents with higher levels of education are more involved in their children's educational and extracurricular activities. The middle class is highly engaged with the educational process, while schools are increasingly encouraging family participation across a range of academic and sporting activities. This represents another sphere requiring attention and balance (Obiol-Francés, 2021).

These patterns differ from the traditional educational styles of the working classes, although some authors attribute this to economic factors (Martín *et al.*, 2014) rather than cultural capital. Hence terms such as "defensive mothering" (Elliot and Bowen, 2018) and "inventive mothering" (Radles, 2021) have emerged. More recently, the importance of trial and error and the family network is emphasised, with families modifying strategies according to results (Alonso and Martín, 2022). Our qualitative methodology aims to address this class dimension in understanding socialisation and education. Alongside these factors, the research focuses on other daily activities and practices shared between household members and those specific to adolescents: consumption, food, leisure, homework and social networks.

In conducting interviews with parents, we sought to understand how family life requires managing different social, individual and family times, as their intertwining is not self-evident and requires constant adjustments between the different social activities of each member. After completing 24 parent interviews, it became essential to establish a category system to summarise the information with methodological rigour and ensure the qualities of exclusivity and completeness required for such a tool (Anguera *et al.*, 2018; Sarriá, 2019).

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Category systems have been used in numerous disciplines and fields such as psychology (Alonso *et al.*, 2024) and education-related disciplines (Ortiz-De-Villate *et al.*, 2023). In sociology, coding is implicit in qualitative research for understanding discourses and presenting results. However, using categorisation as a replicable instrument for future studies – in this case on adolescence – is less common. This article therefore aims to establish a category system designed to understand Andalusian parents' perceptions of their adolescents in academic, social and emotional dimensions. A better understanding of this reality will enable more personalised responses to family needs.

The methodology section describes the category system's utility, the sample, the interview protocol and the process followed for analysis, coding and developing final dimensions. The results section presents the category system. The article ends with a series of discussion and conclusions.

2. Methodology

Qualitative research draws on two important approaches – interpretive social science and hermeneutics – emphasising methodological rigour in interpretive analysis. Both are essential for navigating tensions between subjective interpretation and scientific rigour, advocating an approach that balances hermeneutical understanding with objective norms and moral criteria (Arráiz *et al.*, 2019).

The qualitative methodology aims to understand how those involved experience adolescent reality and the socialisation process that occurs in the home. The research employs interviews with parents, adolescent children and professionals working with young people. This article presents the category system resulting from interviews with the parents.

Twenty-four people with adolescent children were interviewed. They belong to various family and household models – including couples with children, single parents, shared custody, same-sex parents and parents with different nationalities – and social standing (upper, middle and lower classes). New profiles not initially considered were added as the interviews progressed. The fieldwork was conducted in two phases. The first phase ran from 7 November to 22 December 2023. After reviewing and transcribing initial interviews, the research team expanded the study to include new relevant profiles in a second phase, from 20 March to 4 June 2024. Interviews lasted between 40 and 85 minutes.

Initially, the script or interview protocol was developed in collaboration with team members, selecting relevant topics highlighted in the literature and determining

the main research objective: studying family socialisation during adolescence. The interview script followed a temporal structure, beginning with the pre-adolescent stage before moving on to adolescence, focusing on topics such as educational style, daily routines and organisation, and parental context (work schedules, location, work–care balance, etc.). Parents were asked about routines with their adolescent children including meals, studies, leisure, friendships and rules on going out and curfews. Finally, they were asked to assess media coverage about adolescents and discuss their own feelings about their children's socialisation.

A semi-structured interview format was used, as this provided the flexibility to deviate from the script to respond to participants' experiences and delve into different research themes (Ander-Egg and Valle, 2013; Caïs *et al.*, 2014). Interviews were transcribed and analysed using the NVivo software package. This software was used to identify and interpret the categories, applying a socio-cognitive approach (Gee, 2014) and discourse analysis to establish a link between meaning and social dimensions (Wodak and Meyer, 2016). In-depth interviews allowed researchers to focus on participants' experiences and explore all the research themes under investigation (Ander-Egg and Valle, 2013; Caïs *et al.*, 2014). The interview protocol was analysed using the NUD*IST/NVivo software. This software was used to identify and interpret the categories, applying a socio-cognitive approach (Gee, 2014) and discourse analysis to establish a link between meaning and social dimensions (Wodak and Meyer, 2016).

The specialised literature offers various interpretations of the term "category" in qualitative research. Vasilenko *et al.* (2019) describe categories as a way of organising specific information based on its relevance to a topic. These categories represent ideas, concepts or summarised interpretations of citations. In our study, categories are understood as sets of codes that symbolise more abstract concepts. Codes – defined as words or short phrases that assign attributes to data sets, associated with a category – facilitate the establishment of relationships and can be adjusted and refined until they accurately reflect the concept being defined. Categories therefore act as containers for ideas.

The team validated and grouped codes into categories through a collaborative approach. Initially, two of the team's researchers coded and assigned codes to categories based on topics previously assigned in the interview protocol ("a priori" coding). Subsequently, two other researchers conducted coding following an analysis of the parents' discourse, adding and coding new questions ("in vivo" coding). New categories emerged that were not in the original script. These prompted modifications and recategorisations with the creation of new codes, which refined the interview protocol and enabled more precise analysis. This refinement was enabled by unanticipated topics and issues parents raised about their socialisation experiences. Codes addressing similar themes were grouped together.

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3. Results

Below is the final category system developed.

Category I: Parental expectations about pre-adolescence and adolescence

Category II: Educational participation in the home and its impact on daily life

Category III: Parental opinion on relationships in the home and on adolescent social reality

Repeated codes were grouped to form code groups. The following groups were identified:

Category I:

a. Pre-adolescent expectation codes
   1. Pre-adolescence Expectations (PAE)
   2. Families (F)
   3. Value Transmission (VT)

b. Adolescent stage codes
   1. Adolescence Experience (AE)
   2. Parent–Family Relations (PFR)
   3. Changes in Values and Expectations (CVE)

Category II:

c. Educational style codes
   1. Educational Style Types (EST)
   2. Style Variation (SV)
   3. Family Emotions (FE)

d. Homework/routine codes
   1. Daily Organisation (DO)
   2. Obligations/Responsibilities (OR)
   3. Conflicts and Coexistence (CE)
   4. Shared Moments (SM)

e. Food-related codes
   1. Home Meals (HM)
   2. Food and Body Concern (FBC)

f. Formal education codes
   1. Academic Performance (AP)
   2. Motivation and Obstacles (MO)
   3. Technology Rules and Management (TRM)

g. Leisure activity codes
    1. Leisure Preferences (LP)
    2. Technology Use (TU)
    3. Sports Practice (SP)
    4. Outings with Friends (OWF)
    5. Intimate Topics Discussion (ITD)
    6. Money Rules and Use (MRU)
    7. Dress Codes (DC)
    8. Health Status (HS)
    9. Sleep Habits (SH)
    10. Obsessions or Concerns (OC)
    11. Sociability (SOCB)
    12. Family Activities (FA)
    13. Volunteering (VOL)

Category III:

h. Parental situation codes
    1. Work–Life Balance Difficulties (WLBD)
    2. Home Environment (HE)

i. Mass media codes
    1. Perception of News about Minors (PNM)
    2. Socialisation (SOC)

4. Discussion and conclusions

This article presents a flexible and systematic analytical tool for understanding how Andalusian parents experience their adolescents' family socialisation, and describes how it was constructed.

The category system serves as a useful tool for analytical induction in qualitative research, providing a methodological foundation for research design grounded in clear epistemological principles. Authors such as Flick (2018), Anguera *et al.* (2018) and Vasilenko *et al.* (2019) describe categorisation and coding processes in qualitative research as foundational for systematic data structuring, providing validity and reliability to findings. This contribution provides a script that identifies the steps to design a tool enabling discourse collection and analysis, facilitating interpretation. Importantly, the work was conducted collaboratively and interactively by the research team (Miles *et al.*, 2014). This joint approach was instrumental in ensuring that decisions aligned with the research objectives.

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In developing the categories, both deductive and inductive approaches were used (Creswell, 2013), ensuring coherence across categories as the research progressed and enabling data segmentation and coding (Vasilenko *et al.*, 2019). To achieve the proposed objective, the different coding types used in the inductive process have been detailed, most notably "in vivo" coding, which captures what was most important for interviewees (Gibbs, 2007). Subsequently, the description and development of three broad categories selected deductively – corresponding to the work's general objective – was prepared. Finally, through the inductive method, the dimensions were named and the subcategories composing them were defined based on the parent interviews (Blaun and Clarke, 2019), linking identified codes with each other.

The main contribution of the study is the creation of an epistemology-based instrument. All qualitative research, based on supporting theoretical frameworks, requires methodological tools that facilitate development paths in research design (Creswell, 2013). This process was interactive and dialogical. The developed category system is not conceived as a rigid tool but rather as flexible and open to new incorporations of both codes and categories.

The theoretical framework identified relevant issues including adolescent–parent relationships, intensive parenthood (Hays, 1996), educational styles (González and De Pedro, 2023; Suárez-Valenzuela and Suárez, 2023) and family change (Pérez and Moreno, 2021). Our aim was to contextualise household reality within the digital society, the role of media and the risk society. New questions emerged from the interviews beyond those contemplated in the initial script. Some show the changes that families experience in terms of values or educational styles based on each child's needs – an issue usually studied statically in research. The socialisation process produces unexpected challenges that require parents to make decisions. They also learn from their experiences with older children, adjusting their approach with younger ones accordingly. Finally, the importance of social class, level of educational, gender and origin were incorporated through interviewee selection criteria. In short, future research must combine this tool with the nuances revealed by qualitative research, capturing the full complexity of adolescent family socialisation – in our case, in Andalusia.

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DEBATE
DEBATE

DEBATE/DEBATE: BEYOND BIG DATA: GENERATIVE AI AND LLMS AS NEW DIGITAL TECHNOLOGIES FOR ANALYSING SOCIAL REALITY/
MÁS ALLÁ DEL *BIG DATA*: IA GENERATIVA Y LLMS COMO NUEVAS TECNOLOGÍAS DIGITALES PARA EL ANÁLISIS DE LA REALIDAD SOCIAL

Editorial: Generative Artificial Intelligence, Large Language Models (LLMs) and Augmented Analytics vs Big Data and Data Science: New Avenues for Social Research

Editorial: Inteligencia artificial generativa, grandes modelos de lenguaje (LLMs) y analítica aumentada vs. big data y ciencia de datos: Nuevas avenidas para la investigación social

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ABSTRACT

This article comparatively examines the evolution of fields and technologies such as artificial intelligence (AI), business intelligence (BI), data science (DS), big data (BD), large language models (LLMs), generative intelligence, and augmented analytics. Based on the "most cited" and "hot papers" in Web of Science (WoS), it analyzes co-occurrence networks of cited terms, visualizing a knowledge map that highlights key concepts and their connections. Over the past five years, there has been a relative decline in scientific publications on BI, BD, and DS, contrasted with the growing focus on LLMs —such as ChatGPT— generative artificial intelligence, and augmented analytics. This shift marks a significant transformation and opens up a range of opportunities and impacts for the social sciences, as detailed in the articles included in the Debate section of Revista CENTRA de Ciencias Sociales.

KEYWORDS: Artificial intelligence; business intelligence; data science; big data; large language models; generative AI; augmented analytics; Web of Science; knowledge maps; scientific publications; social sciences.

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RESUMEN

Este artículo examina comparativamente la evolución de campos y tecnologías como la inteligencia artificial, la inteligencia de negocios, la ciencia de datos, los big data, los grandes modelos de lenguaje (LLMs), la inteligencia generativa y la analítica aumentada. A partir de los documentos «más citados» y «candentes» de WoS, analiza redes de co-ocurrencias de términos, visualizando un mapa de conocimiento donde se observan temas o conceptos clave de esta bibliografía y sus conexiones. En el último lustro se aprecia una tendencia a la reducción relativa de las publicaciones científicas sobre la inteligencia de negocios, big data o ciencia de datos en comparación con las publicaciones sobre LLMs —como ChatGPT—, inteligencia artificial generativa y analítica aumentada. Se anticipa una interesante diversidad de oportunidades e impactos para las ciencias sociales, como muestran con detalle los artículos incluidos en esta sección de Debate de la Revista CENTRA de Ciencias Sociales.

PALABRAS CLAVE: Inteligencia artificial; inteligencia de negocios; ciencia de datos; macrodatos; modelos grandes de lenguaje; inteligencia artificial generativa; analítica aumentada; Web of Science; mapas de conocimiento; publicaciones científicas; ciencias sociales.

1. From big data and data science to generative artificial intelligence, large language models and augmented analytics

Although we may be at the outset of an emerging trajectory whose implications for the social sciences are still unclear, substantial transformations are already anticipated in several key aspects of intellectual work and research approaches. These changes stem from significant advances associated with technologies and tools such as large language models (LLMs), generative artificial intelligence and augmented analytics. Recent innovations are diversifying and amplifying the impacts that artificial intelligence, business intelligence, big data and data science were already having on the social sciences.

The social impact and the transformations resulting from these innovations – particularly those driven by generative AI – are already under way (Saetra, 2023), affecting multiple sectors and domains such as education (Walter, 2024; Chiu, 2024) and healthcare, where some speak of a paradigm shift in the field of medical imaging (Pinto-Coelho, 2023).

Based on our understanding of the social sciences – as well as insights drawn from texts by Gendler (2026) and Gómez Espino (2026) included in this Discussion section of the *CENTRA Journal of Social Sciences* (https://www.centracs.es/revista) – we

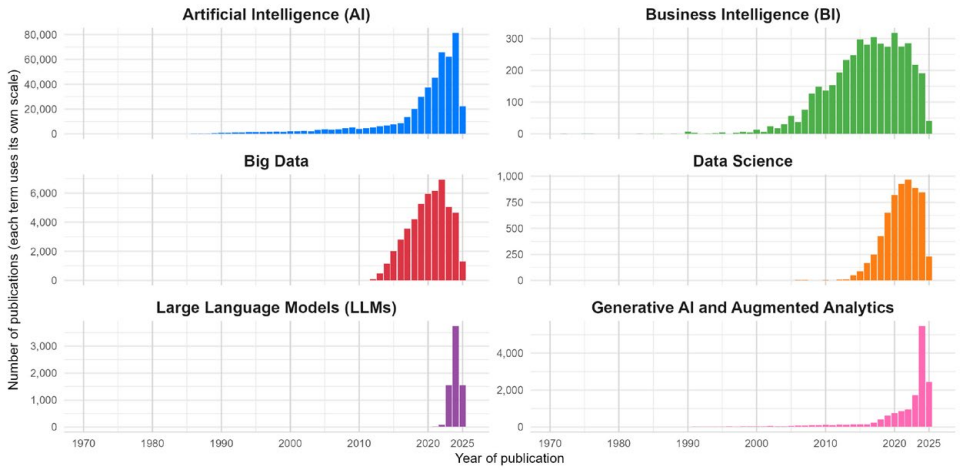
anticipate that the coming years will witness the emergence of research strategies that incorporate one or more of the advances mentioned above. These strategies will likely be combined with varying degrees of engagement in prompting or prompt engineering (Walter, 2024), which is already enabling the social sciences (as well as other disciplines such as health sciences – see Meskó, 2023) to benefit from these innovations without the previous constraint of requiring advanced programming skills. This surge in research that leverages such technological developments is not incompatible with more classical or hybrid methodological approaches.

The trajectory of scientific research in these fields, technologies and tools becomes evident through comparative analysis of relevant publications – a task we summarise below due to page constraints. To provide an introductory comparative overview, a series of bar charts was generated using R. These charts illustrate the temporal evolution of publications whose titles or abstracts include specific terms, based on six separate bibliographic searches: (1) "artificial intelligence OR AI"; (2) "business intelligence"; (3) "big data"; (4) "data science"; and (5) "large language models OR LLMs". Lastly, in order to identify more emerging areas linked to developments in analytical artificial intelligence and augmented analytics, a sixth search was conducted using key terms such as (6) "generative AI", "generative artificial intelligence", "diffusion models", "GANs", "augmented analytics", "automated insights", "natural language generation" and "AI-driven analytics". These general and specific terms offer an overview of ongoing research in this area and enable a preliminary assessment of how these developments may contribute to enriching the work of the social sciences. The searches were carried out using the Web of Science (WoS) bibliographic database (https://www.webofscience.com/wos/), covering the entire series of available publications up to the end of May 2025. Publications were filtered by the "Social Sciences" research domain in WoS.

Figure 1 presents absolute annual publication counts for each search. To improve the readability of temporal trends, each panel employs an independent vertical axis (scaled to the range of its respective series). It is important to note that bar heights are not comparable across panels, only within individual panels. Given the differences in volume between areas, we opted for this panel design with separate axes in order to clearly show the evolution in each case, without resorting to logarithmic scales. No normalisation was applied to the series: the bars represent absolute counts per year within each panel.

Figure 1

Trends in publications in the social sciences (by field and technology) – WoS



Source: compiled by the author using R, based on data from WoS.
An interactive version of this chart is available. Both the interactive chart and the code and data used to generate it can be accessed via the following link: https://doi.org/10.5281/zenodo.17298490 (Gualda, 2025).

This comparative strategy provides a valuable overview of the evolution of these fields and highlights key milestones. It also lays the groundwork for a more in-depth exploration of the core terms used to define these fields and technologies, and the connections between them. In addition, it offers insight into some of their most significant branches through network or co-occurrence analysis of key concepts (knowledge maps), a method previously applied in other bibliometric studies (Cobo *et al.*, 2011).

Although all available publication data from WoS were extracted without a time restriction, following a preliminary pre-analysis, the comparative time series visualised in the charts focuses on the period from 1970 to the end of May 2025 (the cut-off point at the time of writing). In the period preceding the 1970s – particularly from the 1950s onward – the field of artificial intelligence was already taking shape. From the outset, it was grounded in the notion that machines could be created to simulate human thought or to perform tasks that "would be considered intelligent if done by a human being" (Skinner, 2012, p. 3). Even within the social sciences, early explorations can be traced concerning the use of computers for statistical analysis and the simulation of social phenomena, notably with the emergence of landmark software such as SPSS in 1968. Gendler's (2026) contribution to this Discussion section offers a detailed analysis of this historical evolution in the social sciences and humanities in relation to digital technologies.

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Meanwhile, the early development of business intelligence can be traced back to the 1960s (Luhn, 1958), with the introduction of foundational concepts and systems for organising and analysing business data to support decision-making. Similarly, the creation of relational databases laid the foundations for data organisation (Codd, 1970), serving as precursors to modern data management systems.

A comparison of the publication trends across the six identified fields and technologies shows that academic work on artificial intelligence related to the social sciences began significantly earlier than in the other areas. A substantial increase is visible from around 2010 onwards, with particularly rapid growth over the past five years (see Figure 1). Interest in artificial intelligence in the social sciences has remained steady over time, although its growth was initially slow during the early decades. By contrast, while publications on business intelligence appeared slightly later than those on artificial intelligence, they began to increase steadily from the early 1990s. From 2005 onwards, a sustained and marked growth in publication volume can be observed. It should be emphasised that the trends presented here refer specifically to the evolution of literature on these fields and technologies, filtered by publications classified under the "Social Sciences" domain in the Web of Science database.

Compared to the earlier emergence of the fields of artificial intelligence and business intelligence, the domains of big data and data science – which are often closely linked – began to attract growing interest within the social sciences from the second decade of the 21st century. A surge in research output relating to big data is evident from around 2010–2012, a period that also saw a parallel, albeit somewhat more modest, increase in publications associated with data science, a field closely connected to big data. In the past five years, there appears to have been a relative decline in the number of documents referring specifically to big data, contrasted with a continued rise in publications focused on data science.

Key developments shaping this evolution in the 21st century include the advances in and expansion of deep learning (DL) since 2010, which have revolutionised the field of AI, and the emergence of large language models (LLMs), somewhat later, with the introduction of technologies such as ChatGPT and similar tools (Meskó, 2023; Saetra, 2023; Cooper, 2023). These advances, particularly in deep learning, have enabled progress in areas such as image and voice recognition and natural language processing – developments that are having a profound impact on the social sciences. At the same time, the creation of language models based on transformer architectures, capable of generating and interpreting text at great speed, constitutes a new and significant disruption within the field. This topic is addressed in detail in Gómez Espino's (2026) article in this Discussion section, which focuses on thematic qualitative coding processes. It examines the contributions of large language models to qualitative research through the development of the Social Verbatim tool, emphasising the importance of human–machine collaboration.

Although publications on large language models, generative intelligence and augmented analytics represent very recent areas of research, the exponential increase in related outputs – visible in the charts in Figure 1 – suggests that these domains will undergo intense development within the social sciences in the coming years. LLMs and the practice known as prompting may provide a significant boost to a wide range of tasks associated with research in general, and with social science research in particular, by stimulating what Mills (1959) referred to as the "sociological imagination". The potential of artificial intelligence to act as a technical assistant – in its latest forms (LLMs, generative and analytical AI) – may help the social sciences to overcome previously existing technical barriers. It can also enhance research across a wide spectrum of activities, including literature retrieval, document coding and classification, text mining, rapid execution of complex analyses across diverse data types (text, image, sound, video), improved visualisations and much more.

2. Knowledge maps and significant clusters related to literature on classical and modern artificial intelligence, business intelligence, big data and data science

Having broadly outlined the evolution of publications in the social sciences across different fields and technologies, we now turn to an analysis of co-occurrence networks and term clusters, allowing us to sketch out knowledge maps (Cobo *et al.*, 2011) of the field of artificial intelligence – both classical and modern – as well as related lines of research such as business intelligence, big data and data science. Due to space constraints, this will be a concise global analysis, although some additional details may be observed in the accompanying figures. For this analysis, we focus exclusively on the "most cited" and "hot" documents indexed in WoS, in order to visualise both the key topics and concepts emerging from this body of literature and the interconnections among them.

To this end, from the set of articles used to trace publication trends, we extracted those classified in WoS as "most cited" and "hot" across the six search categories (artificial intelligence, business intelligence, big data, data science, large language models, and generative and augmented AI). These datasets were then merged using R, duplicate records were removed and the resulting file was adapted for import into the bibliometric analysis software VOSviewer (Van Eck and Waltman, 2010). Relevance metrics were calculated, followed by the visualisation and mapping of the most significant clusters.

Figure 2 presents a knowledge map that displays the most relevant terms appearing in the most cited works in this literature. Network analysis conducted with VOSviewer enabled the identification of multiple clusters, each grouping together interconnected terms that represent core thematic areas within the field. Terms were extracted from the titles and abstracts of the documents. The visualisation includes

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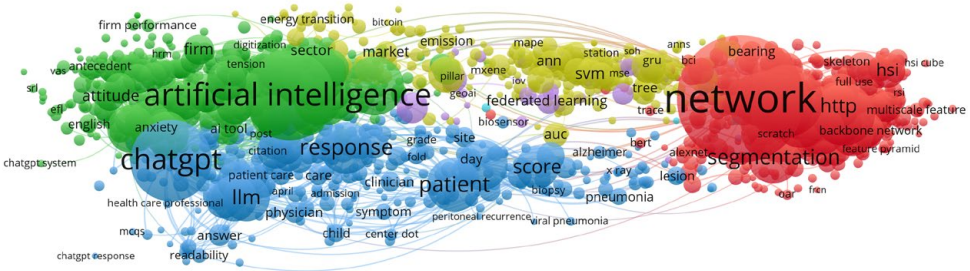
only highly relevant terms, which provide clear indications – through colour-coded subgraphs – of the principal research areas. The interconnections allow us to identify the most prominent links within the literature. In the brief analysis that follows, we refer to some of the most influential terms based on the Total Link Strength indicator – a metric that highlights the foundational elements of each cluster. The size of each node within the cluster is also associated with the centrality of that term. The proximity between terms likewise suggests a stronger relationship or frequency of co-occurrence.

Figure 2

Knowledge map of fields and technologies associated with artificial intelligence



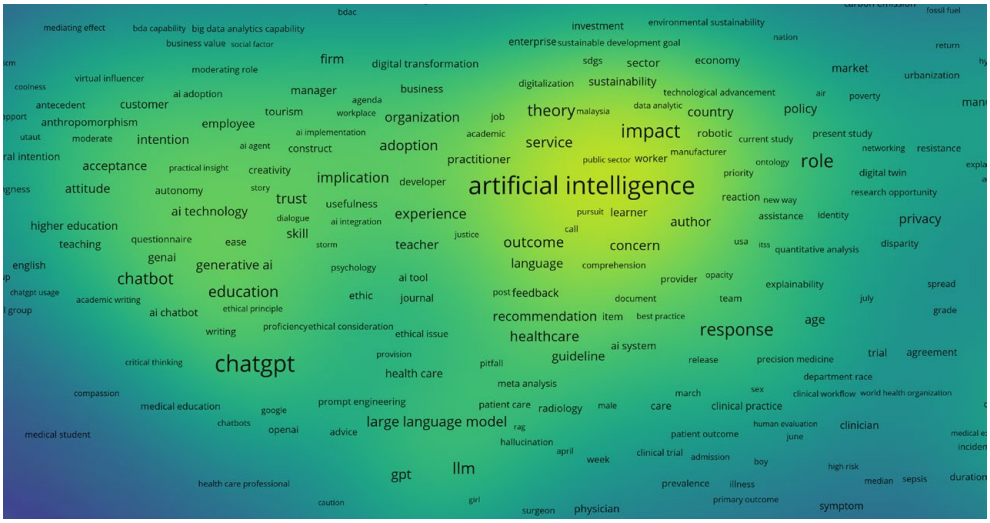
Source: own research based on VOSviewer. Data extracted from WoS and processed in R.

2.1. Artificial intelligence, society and human–machine interaction (green cluster)

The green cluster, focused on artificial intelligence, constitutes one of the core groupings in this knowledge map. It reveals the centrality of literature addressing the adoption, perception, use and societal impact of AI and its related technologies across a range of social and organisational contexts. This includes domains such as customer experience, business management and user acceptance. Notably, some of the most prominent terms[1] include "adoption", "acceptance", "AI adoption", "AI technology", "AI use", "usage intention" and "technology acceptance model (TAM)". These are linked to studies examining the psychological and behavioural factors that influence technology adoption – particularly perceived usefulness and ease of use. Many of these and related terms are visible in the heat map shown in Figure 3.

Figure 3

Heat map or density map of the green cluster



Source: own research based on VOSviewer. Yellow indicates a higher density or concentration of publications associated with the given topic.

This cluster also includes a substantial body of literature on human–AI and human–robot interaction, illustrated by terms such as "human AI interaction", "human robot interaction (HRI)", "human machine interaction" and "robot". Complementary lines of research address human emotions and attitudes – terms such as "anxiety", "AI anxiety", "fear", "negative emotion" and "positive emotion" feature prominently – as well as robot characteristics that influence such interactions. These include "anthropomorphism" and "social presence", which are frequently cited in the literature.

The cluster also places strong emphasis on the role of AI in education and learning, with key terms including "education", "higher education", "student", "teacher", "academic writing" and "language learning". The literature explores how AI is reshaping teaching and learning processes, while also engaging with ethical challenges such as plagiarism, privacy and broader ethical considerations. In the business domain, the literature documents the impact of AI on management and digital transformation, highlighting its role in redefining the organisational landscape. This is reflected in the presence of terms such as "business", "digital transformation", "innovation", "sustainability", "job", "employment", "supply chain" and "customer", pointing to its relevance across a variety of sectors including hospitality, tourism and services. While not the only cluster addressing these developments, this grouping is particularly notable for its focus on LLMs and generative AI. This is evident in the frequent use of terms such as "chatbot" and "ChatGPT", which reflect

ongoing experimentation in these areas and contrast with earlier research centred primarily on predictive models. The cluster also reveals a strong orientation towards rigorous research and methodological robustness. Terms such as "empirical study", "qualitative study" and "SEM" (structural equation modelling) are common, underscoring the importance of empirical validation and theoretical development in advancing our understanding and management of AI's societal impacts.

2.2. Deep neural networks: computer vision, detection and image segmentation (red cluster)

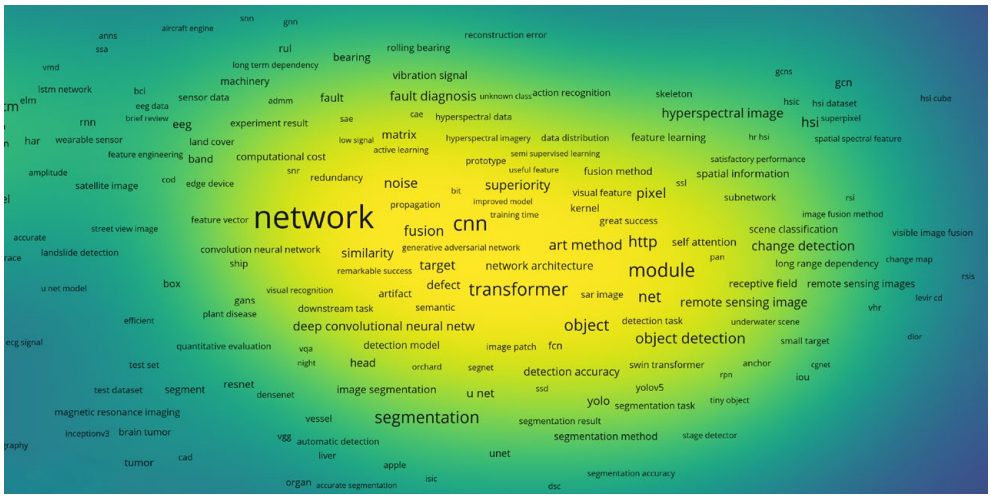
This cluster encompasses core concepts related to architectures such as convolutional neural networks (CNNs) and transformers. The associated literature highlights key applications in recent artificial intelligence research – applications that are of growing relevance and potential within the social sciences – particularly in the areas of computer vision, object detection and image segmentation.

The publications grouped within this cluster represent a focal point of current AI research, notable for their emphasis on the potential of image processing and analysis, among other areas. The term "network" exhibits the highest degree of connectivity within the cluster. Other key terms around which the literature is organised (Figure 4) include: "module", "segmentation", "detection", "fault diagnosis", "target detection", "neural", "image fusion", "layer", "experimental result", "code", "github.com" and "superiority". Algorithm-related terms such as "CNN", "LSTM" (long short-term memory) and "SVM" (support vector machine) also occupy a central position.

The literature suggests that research in this area is primarily focused on the design of efficient architectures, the ongoing improvement of performance and the applicability of models to a variety of real-world scenarios. This includes efforts in feature extraction and fusion, as well as the development of models that are efficient and deliver excellent performance. Publications in this cluster are also characterised by a strong commitment to experimentation, empirical validation and collaborative practices, particularly through code sharing. These studies seek to address challenges such as class imbalance and overfitting, with the aim of enhancing generalisation ability.

Figure 4

Heat map or density map of the red cluster



Source: own research based on VOSviewer. Yellow indicates a higher density or concentration of publications associated with the given topic.

2.3. AI and LLMs in the healthcare domain: from diagnosis to decision-making and ethical considerations (blue cluster)

This cluster is large and heterogeneous, bringing together research in artificial intelligence (AI) with the healthcare and medical domains. It is primarily oriented towards the application of AI and data science in healthcare, with particular emphasis on the growing use of LLMs such as ChatGPT. Key terms associated with this cluster include "ChatGPT", "LLM", "healthcare", "medicine", "patient", "clinical", "diagnosis", "disease", "symptom", "physician", "clinical decision", "drug discovery", "pneumonia" and "COVID".

Research in this area focuses on the diagnosis and detection of diseases – such as cancer, pneumonia and Alzheimer's disease – using AI to enhance accuracy and efficiency. These efforts often rely on medical imaging techniques, including chest X-rays and computed tomography (CT) scans. The literature also examines the role of AI in supporting clinical decision-making processes and in the management and analysis of patient data. In parallel, this cluster engages extensively with the ethical, social and regulatory implications of AI in healthcare. It addresses principles such as accountability, transparency and fairness, while also confronting challenges related to algorithmic bias and misinformation. Research methodology is a central concern in this body of work, highlighting the need for a robust evidence base – grounded in clinical trials and systematic reviews – to ensure the safe, effective and equitable integration of AI into medical practice. Overall, this cluster reflects the comprehensive ecosystem of AI in the healthcare sector, encompassing both its technological

capabilities (diagnosis, clinical support, data processing) and the critical ethical and social considerations that shape its implementation.

2.4. Distributed AI, blockchain, privacy and optimisation (purple cluster)

This cluster represents the intersection of artificial intelligence with distributed technologies, security, privacy and optimisation. The associated terms indicate a focus on the secure and efficient implementation of AI within distributed or decentralised systems, with an emphasis on confidentiality, integrity and scalability in large-scale applications. Key terms include "blockchain technology", "distributed ledger technology (DLT)", "federated learning", "edge computing", "NFT" (non-fungible token) and "cryptocurrency" in the field of distributed technologies. Security- and privacy-related concepts are also central to this cluster, as shown by the presence of terms such as "data privacy", "privacy policy", "privacy preserving", "privacy leakage", "privacy protection", "attack", "cybersecurity", "distributed attack" and "malicious attack".

In the area of optimisation and operational efficiency, terms such as "optimization", "algorithm", "resource allocation" and "energy efficiency" feature prominently. Emerging application areas identified in this cluster include "metaverse", "digital twin", "smart city", "smart manufacturing", "internet of vehicles" and "cyber physical system". Other key terms include "content generation", "recommender system", "deep reinforcement learning", "graph neural network", "data management", "data sharing" and "simulation". Research in this area focuses on the secure and efficient operation of AI-driven systems in contexts such as federated data environments, supply chain management, smart infrastructure and the metaverse. Particular emphasis is placed on information protection and the prevention of cyberattacks, with simulation playing a central role as a methodological approach for validating proposed solutions.

2.5. Machine learning, predictive analytics and business intelligence (yellow cluster)

This cluster maps concepts related to advanced machine learning and deep learning techniques and models applied to data analysis and predictive tasks. It includes architectures such as "LSTM", "SVM", "random forest", "XGBoost" and "ANN" (artificial neural network). Key terms in the associated literature also reference validation metrics, including "AUC" (area under the curve) and "RMSE" (root mean square error), which are commonly used to assess model performance. The cluster additionally encompasses "business intelligence" (BI) and the application of these models to business and market contexts, as reflected in terms such as "market" and "firms".

At a broader level, the different clusters in the map exhibit strong interconnectivity. The green cluster (artificial intelligence), in particular, appears to serve as a central axis, linking directly with the blue cluster (AI and LLMs in healthcare), the yellow cluster (machine learning and BI), and the red cluster, which focuses on recent developments in deep neural networks and computer vision. This structural configuration underscores the role of AI as a unifying core that connects both technical advancements and applied domains.

3. Avenues for social research: by way of conclusion

Although the brief and general overview we have provided – drawing from a single source (Web of Science) – can offer only a preliminary outline of the profound transformations currently under way, it is evident that the new technologies and tools associated with artificial intelligence are opening up an immense range of opportunities for research, analysis and intervention across the diverse disciplines that make up the social sciences. While synthesising this evolving landscape was by no means a simple task, the exercise has served to introduce and frame this Discussion section of the *CENTRA Journal of Social Sciences*, and to provide a preliminary insight into some of the themes that have attracted the most attention within the social sciences at various historical junctures, as well as to highlight emerging areas within AI that deserve particular focus. A more comprehensive analysis is offered in the contribution by Gendler (2026) included in this issue.

Within the broad field of AI, special attention is warranted for developments related to large language models (LLMs) and to generative and analytical AI. These models – often multimodal in nature (Meskó, 2023) – are distinguished by their capacity not only to analyse or classify data, but also to generate original and novel content. The ability to create text, images, audio, video or code represents a highly advanced capability that must not be overlooked.

This generative capacity, alongside its benefits, has also sparked major questions, debates and critiques – especially concerning the potential harms that may arise when generative AI is used to produce content (Saetra, 2023; Harrer, 2023). Prominent concerns include the exponential amplification of disinformation, hate speech, deepfakes, and the creation of harmful or misleading content through unsupervised generative AI systems (Harrer, 2023).

Other critical dimensions relate to the presence of biases embedded in algorithms (Varsha, 2023); accusations of plagiarism involving academic, artistic or other forms of content; ethical considerations; and potential infringements of copyright. These issues intersect with broader challenges concerning data privacy, anonymisation and security, as well as the protection of data from monopolisation by private actors, and the need for robust frameworks of AI ethics and governance (Murdoch, 2021; Müggе, 2024). Further substantive critiques – previously noted in relation to the green cluster – include the tendency to anthropomorphise AI (Ryan, 2020), such as the attribution of human moral qualities to artificial systems through concepts like "trustworthy AI", and the growing over-reliance on tools like ChatGPT as epistemic authorities. This latter concern relates to the uncritical acceptance of outputs as singular truths, often lacking adequate evidentiary foundations (Cooper, 2023).

In this shadow landscape, the focus broadens to consider systemic impacts – including environmental, labour-related, power and governance issues. Among the risks associated with generative AI is the high resource consumption involved in training and deploying large-scale models, particularly in terms of energy and water usage, as well as the accelerated turnover of hardware infrastructure.

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Moreover, part of the labour underpinning these systems – such as annotation and content labelling tasks required for model training – is frequently outsourced to individuals working under precarious conditions. Control over data, models and cloud infrastructures is also becoming increasingly concentrated in the hands of a few companies, creating significant dependencies and limiting prospects for democratic governance. Additional challenges include security and reliability concerns (e.g. prompt manipulation or fabricated outputs, often referred to as hallucinations) and biases that disproportionately affect under-represented languages and social groups. Collectively, these concerns call for the reinforcement of meaningful human oversight, greater transparency and the establishment of governance mechanisms before such tools are deployed in sensitive domains.

Without losing sight of these or other critical dimensions – some of which have been noted only briefly – it is also important to reflect on the new avenues currently opening up for the social sciences in light of recent advances in artificial intelligence. Several of these appear especially significant:

1. The expanded scope and scale at which research can now be undertaken, enabling the analysis of previously unimaginable volumes and types of data – including both structured and unstructured data from diverse sources;
2. The identification of patterns, correlations, structures, networks and trends that were difficult or impossible to detect using traditional methods;
3. Enhanced capacity to understand and integrate macro-, meso- and micro-level dimensions of social life, and to combine research findings with greater precision, thanks to increasingly powerful analytical tools and improved data processing capabilities – applicable to both small and big data;
4. The generation of new hypotheses and research pathways arising from previously inaccessible findings;
5. The versatility of emerging tools, which can be adapted and customised for different social sectors, contexts and populations;
6. Improved visualisation of complex data in interactive formats, fostering clearer and more intuitive understandings of social phenomena;
7. Easier generation of robust evidence to support more informed decision-making and to underpin a range of social policies and programmes;
8. Strengthening of mixed-methods, interdisciplinary and transdisciplinary research approaches, facilitating collaboration across scientific domains – including the social sciences, arts and humanities, life sciences and biomedicine, physical sciences and technology;
9. The automation of time-intensive or repetitive research tasks, resulting in greater efficiency and productivity;
10. The reinforcement of methodological integration and the expansion of mixed-methods strategies in social science research.

One of the key benefits associated with the development of artificial intelligence and its implementation in the social sciences is the expansion of our capacity to understand complex phenomena, to observe and anticipate emerging trends, and to formulate more effective, evidence-based social interventions. An additional and increasingly critical aspect – already highlighted by recent research across multiple disciplines – is the need to advance human–AI collaboration, alongside a growing call for AI literacy. Rather than placing blind trust in these technologies, a more reflective and informed engagement is required (Harrer, 2023; Walter, 2024).

In conclusion, from our perspective, one of the most valuable opportunities for the social sciences in engaging with these emerging fields lies in the potential to enhance the reach and depth of mixed or hybrid methods, and to revitalise qualitative research approaches which, to some extent, have been marginalised by the rise of big data and the dominant focus on large-scale pattern detection. The contribution by Gómez Espino (2026), included in this Discussion section, offers a compelling illustration of this potential. His work demonstrates how AI and LLMs can be applied to improve qualitative transcription and coding processes through the Social Verbatim tool. At the same time, it invites reflection on the artificial divide between quantitative and qualitative methods – helping to blur and ultimately transcend this boundary. As he explains, the possibility of implementing zero-shot AI models – capable of being trained by social scientists to identify or categorise emergent topics or "codes" – represents one of the key challenges and opportunities on the horizon. Moreover, this contribution, together with that of Gendler (2026), highlights the importance of maintaining a critical and ethically grounded approach to data within the social sciences, given the social sensitivity and potential implications associated with its use.

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Notes

1 The terms referenced correspond to those included in the knowledge map or drawn from the full database, to support more precise descriptions.

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MÁS ALLÁ DEL *BIG DATA*: IA GENERATIVA Y LLMS COMO NUEVAS TECNOLOGÍAS DIGITALES PARA EL ANÁLISIS DE LA REALIDAD SOCIAL

Social Sciences and Digital Technologies: A Long and Complex Path of Approaches and Interrelationships

Ciencias sociales y tecnologías digitales: un largo y complejo camino de enfoques e interrelaciones

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ABSTRACT

Since the 1970s, the introduction and gradual widespread adoption of digital technologies (DTs) have significantly affected political, economic, social and cultural aspects of society. The social sciences and humanities have been profoundly shaped by these technologies, generating new challenges regarding how these disciplines structure research and conduct scholarly activities. This article examines the current state of research in the social sciences and humanities concerning digital technologies, analysing the different approaches that have emerged, their characteristics, differences and similarities. Drawing on an extensive literature review, we propose a categorisation that classifies the range of approaches to digital technologies. These span from primarily theoretical and conceptual frameworks, to analyses of the impact of digital technologies and instrumental approaches incorporating software packages for methodological techniques, to the most recent computational approaches that have made advanced computational methods their defining characteristic: computational social science and digital humanities.

KEYWORDS: digital technologies; information and communication technologies; social sciences; computational methodologies; computational social sciences; digital humanities.

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RESUMEN

Desde la década de 1970, la introducción y paulatina masificación de las tecnologías digitales (TD) ha generado fuertes impactos en las distintas esferas políticas, económicas, sociales y culturales de la existencia. Las ciencias sociales y las humanidades no han sido ajenas a los efectos de la incorporación de estas tecnologías, empezándose a abrir nuevos desafíos en los modos, formas, técnicas y conceptualizaciones en los que estas disciplinas se estructuran y realizan sus labores de investigación. El presente artículo tiene como objetivo delinear un estado de situación respecto de las distintas corrientes que se han planteado en las ciencias sociales y las humanidades para vincularse con las TD, analizando condiciones de surgimiento, características, diferencias y similitudes. A partir de una exhaustiva revisión bibliográfica, se propone una categorización que permita clasificar el abanico de enfoques en relación a las TD. Se consideran aproximaciones centralmente teórico-conceptuales, análisis de impactos de las TD, movimientos instrumentales de incorporación de paquetes de software informáticos para técnicas metodológicas, hasta aquellos enfoques computacionales reflexivos más recientes que han hecho de la incorporación de técnicas informáticas avanzadas su característica fundacional: las ciencias sociales computacionales y las humanidades digitales.

PALABRAS CLAVE: tecnologías digitales; tecnologías de la información y la comunicación; ciencias sociales; metodologías computacionales; ciencias sociales computacionales; humanidades digitales.

1. Introduction

Within the context of various forms of competition involving the United States and the USSR during the Cold War, research incentives were promoted around numerous technological developments, particularly regarding digital technologies (DTs) (Gendler, 2023; Galliano, 2024). These developments converged with other factors: the exhaustion of the industrialist model that culminated in the 1973 oil crisis and the microelectronics revolution at the beginning of the 1970s (Castells, 1999); various government plans to computerise society, such as the one prepared in 1971 by the Japan Computer Usage Development Institute (JACUDI) and the Nora-Minc report, published in France in 1978, among others (Mattelart, 2002); the abandonment of the gold standard in favour of the dollar in 1971, together with the 1985 Plaza Accord, after which risk capital flows were redirected primarily towards the telecommunications sector (Srnicek, 2018); and the gradual but firm advance of neoliberalism as a framework of intelligibility (Foucault, 2007). These elements, among others, enable us to understand the shift from an industrial development model based on matter and energy towards a new type of society: an information society, where information and knowledge – concretised in information and communication technologies (ICTs) generally, and DTs particularly – constitute the main input of this new mode of informational development (Castells, 1999). Within this framework, the development and penetration of computer and digital technologies since the 1970s have generated substantial effects across all spheres of social, political, economic and cultural life.

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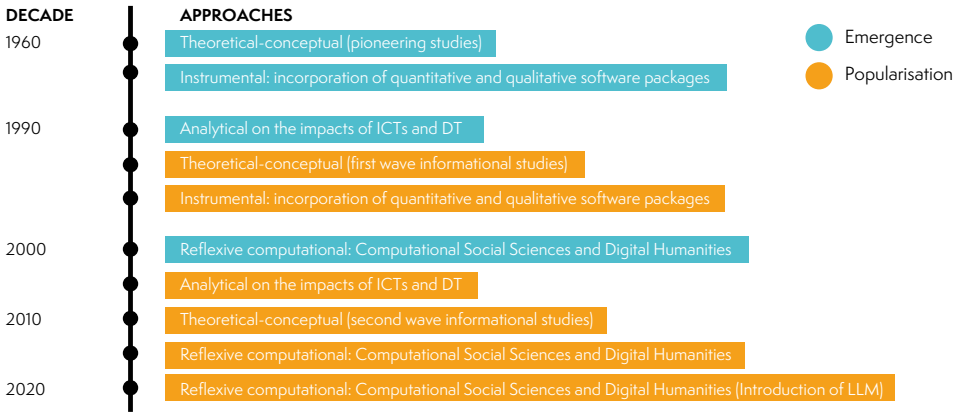
The social sciences and humanities have been profoundly affected by the incorporation of these technologies, opening new challenges in the methods, forms, techniques and conceptualisations through which these disciplines structure and conduct research.

This article outlines the ways in which the social sciences and humanities have engaged with DTs from their emergence in the early 1970s to the present. Drawing on an extensive literature review supplemented by key informant testimonies,[1] we develop a categorisation to classify the range of approaches and currents linking the social sciences and humanities to DTs, considering socio-historical conditions of emergence, characteristics, principal exponents, focal points, differences and similarities. These relationships are examined from a socio-historical perspective, differentiating between positions focused on theoretical–conceptual issues and those centred on software package usage, while acknowledging mixed positions. Accordingly, four main approaches can be proposed: a primarily theoretical–conceptual approach; studies and analyses focused on the impacts of DT; instrumental approaches that incorporate computer software packages for methodological purposes; and reflective computational approaches, such as (computational social sciences and digital humanities).

Diagram 1

Approaches linking the social sciences and humanities with ICTs and DTs, by decade of emergence and popularisation



Source: own research.

Any categorisation necessarily involves overlaps between categories. A further clarification is needed: although this article is structured to address macro-global trends and currents, many observations and the consulted literature may reflect the author's socio-territorial and contextual positioning. In other words, while this work aims to portray and categorise the links between the social sciences, the humanities, and DTs in the Western Hemisphere, it may place greater emphasis on Spanish-language literature produced in, or particularly influential within, Latin America and the Southern Cone.

2. Theoretical–Conceptual Approaches

The first approach addressing the link between these disciplines and DTs is also the first to emerge chronologically. It encompasses theoretical–conceptual elaborations generated from the social sciences and humanities whose primary focus is societal transformations, with particular emphasis on the role of telecommunications, ICTs generally and DTs specifically. Notably, even before the events highlighted in the introduction – which we postulate as the main vectors of change towards an information society and the drivers of DT development and penetration – a varied range of analyses warning of transformations in industrial societies had already emerged since the late 1950s.

Following Sánchez Torres, González Zabala and Muñoz (2012), with some additions, it is possible to identify in these early elaborations writings on post-capitalist society (Dahrendorf, 1959), the information society (Masuda, 1962), the knowledge economy (Machlup, 1962), the knowledge society (Drucker, 1969), the technotronic era (Brzezinski, 1970), post-industrial society (Touraine, 1971 and Bell, 1973), the information economy (Porat, 1977), the computer revolution (Tomeski, 1970 and Hawkes, 1971), the computerised society (Martin and Norman, 1970), the post-liberal age (Vickers, 1970) and risk societies (Beck, 1986), among others.

These early analyses – particularly Bell (1976) – focused on identifying a new pre-eminence of theoretical and applied knowledge in the productive sphere, analysing the changes generated and highlighting the role of sectors that produced, interpreted and disseminated such knowledge. The new form of society superseding the industrial one was characterised by the shift from a commodity-producing to a service-producing economy; the pre-eminence of professional and technical classes; the centrality of theoretical knowledge as a source of innovation and political formulation; regulatory controls to reduce uncertainty in technological innovations; and the creation of new "intellectual technologies" influencing decision-making by reducing risks caused by the "human factor". Importantly, in these pioneering analyses, technologies occupied a secondary role, being merely part of the concretisation of knowledge innovations. This was also due to the limited circulation and availability of

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ICTs and DTs across different spheres, which were not yet considered central factors in societal changes.

This began to change during the 1990s. The fall of the USSR in 1991 and consolidation of the neoliberal paradigm centred in the United States; the promulgation of more concrete computerisation plans such as the European Community's Bangemann report in 1993, the USA's Information Highways in 1994 and a revised version of Japan's JACUDI plan; the invention of the world wide web in 1991 and the browser in 1993; the opening of the internet to both the business world and a broader user base in 1994; the gradual reduction in costs of personal devices and network connection plans; and the crisis in cultural industries alongside strengthened intellectual property regulations – these are just some of the principal historical–contextual factors that explain the growing presence and impact DTs began to have across different social spheres (Gendler, 2023). Within this framework, a second wave of theoretical–conceptual elaborations emerged, including writings on the society of control (Deleuze, 1990), postmodernity and time–space compression (Harvey, 1990), post-Fordism (Lipietz and the Regulation School, 1994), high modernity (Giddens, 1994), the information age (Castells, 1995 and 1999), the knowledge-based economy (OECD, 1996), turbo-capitalism (Luttwalk, 2001), cognitive capitalism (Boutang, Rullani and Vercellone, early 2000s) and immaterial capitalism or empire (Hardt and Negri, 2004), among many others.

Unlike the pioneering works, these productions – while continuing to argue for the pre-eminence of knowledge as a key factor differentiating the changes from those of industrial society – identified a central role for ICTs and DTs both in the creation, dissemination and modification of information/knowledge and as the principal driving mechanisms of changes in capitalist configuration. In other words, the new informational configuration was characterised as primarily oriented towards knowledge accumulation, acceleration and flexibility of roles and processes, and improved information processing capacity via technological development (Castells, 1999). Likewise, several works addressed new challenges introduced by the dismantling of the welfare state and the hegemony of neoliberal policies closely linked with the expansion of ICTs and DTs.

After the 2000s, following the dotcom bubble crisis in 2001, events such as the emergence and rising popularity of social networks between 2002 and 2008; the international economic crisis of 2008; the creation of the smartphone in 2007; the consolidation of the digital platform model during the 2010s (and its attendant scandals); the COVID-19 pandemic; the dramatic expansion of social datafication; and the explosion of generative artificial intelligence in the early 2020s enable us to identify a second stage within the informational paradigm (Gendler and Girolimo, 2025; Galliano, 2024) – one more focused on data and their processing – and a third wave of theoretical–conceptual elaborations. Within this framework, we can identify productions on the hypermediated

society (Scolari, 2008), the performance and burnout society (Han, 2012), the second machine age (Brynjolfsson and McAfee, 2014), cybernetic capitalism (Tiqqun, 2015), the industry 4.0 society (Schwab, 2016), platform capitalism (Snircek, 2016), platform society (Van Dijck, Poell and De Waal, 2018; Zukerfeld, 2020), the silicolonisation of the world (Sadin, 2018), surveillance capitalism (Zuboff, 2019), capitalism 4.0 (Galliano, 2020), infocracy (Han, 2021) and technofeudalism (Durand, 2021; Varoufakis, 2023), among many others.

While these works present significant differences in terms of expectations, concerns and modes of analysis, they all identify a new set of DTs much more focused on the storage, processing and application of vast datasets for the social modulation of individuals, collectives, institutions and processes of all kinds. Likewise, several of them analyse the intertwining of DTs and social processes, indicating their degree of intensification and contemplating new actors of great importance in the form of major technology companies ("Big Tech"), proposing various interpretive frameworks for their understanding.

It should be noted that, despite coexisting temporally with the development of multiple software packages for social research,[2] the output within this approach has not made extensive use of them, prioritising theoretical–conceptual work[3] and, at least at an operational level, constituting the "least digital" of the perspectives proposed here.

3. Analytical Approaches to ICT and DT Impacts

The second approach encompasses research focusing mainly on the impacts and effects of ICT and DT introduction and penetration across different social dimensions: education, work, sociability, tourism, urban planning, social assistance, social protest and many others.

As previously mentioned, published works within the theoretical–conceptual approach have focused on developing broad explanatory and interpretive frameworks regarding the reasons and causes of societal transformations, examining the leading role of information, knowledge and different ICTs and DTs. While many have explored the effects of these modifications on different aspects of social existence, this was often done contextually or illustratively, without substantial depth or systematic analysis. This task has been taken up by another stream of academic work on ICTs and DTs – one more specialised and centred on their impacts and transformations within specific dimensions. Within this perspective, it is also possible to identify the gradual incorporation of software packages for social research, encompassing both quantitative and qualitative techniques.[4] The main indications of this begin in the 2000s, in many cases supplementing or replacing manual and analogue techniques and processes with these computer programs.

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Research and works within this approach shares the following characteristics. First, it focuses on the analysis of socio-technical impacts, prioritising a single dimension. Examples include the effects of the introduction of technology in university teaching, reconfigurations of informational work, digitisation of files and processes in state institutions, new technology-mediated processes and urban management, new artistic expressions within digital culture, message circulation on social media platforms, online social movements and collective action, new consumption patterns and forms of expression on social networks, among many others.

The vast majority of studies on the impacts of DTs draw upon one or more theoretical–conceptual frameworks, focusing on researching, describing and/or analysing the effects arising or observed in the selected dimension and field. This perspective emphasises empirical work over theoretical–conceptual construction, for the most part applying, deepening, testing, refuting and/or adding complexity to these general frameworks regarding the specific topics addressed. Notably, in some cases, new theoretical–conceptual tools are produced, though these present a lower level of abstraction compared to those generated in the broader frameworks of the previous approach, often requiring conceptual bridges between macro-level theoretical–conceptual perspectives and observed phenomena. Examples include digital inclusion practices (Crovi Druetta, 2004), "digital natives" (Piscitelli, 2008), collective action on social media (Lago Martínez, Gala and Samaniego, 2023; Sierra Caballero, 2020), the social appropriation of technologies (Morales, 2009) and platform work (Negri, 2020), among many others. These works begin to emerge in the mid-1990s, becoming especially prominent from the 2000s onwards, reflecting the expansion of DTs and the internet and, consequently, the greater presence and impacts across different dimensions of social existence. As with the previous current, these analyses are shaped by the socio-technical context of their period, in several cases concentrating research efforts on the impacts of the most recent and disruptive DT configurations.[5]

4. Instrumental Approaches: Incorporation of Methodological Software in an Instrumental Way

We arrive here at a complex point. As mentioned, this article aims to address and categorise the different ways in which the social sciences and humanities have engaged with DTs. It is therefore necessary to consider another stream—one that has achieved the widest uptake while remaining perhaps the least specific on this issue. In other words, this stream frames the relationship between the social sciences and the humanities in relation to DTs as largely instrumental and applied: an "approach that is not an approach" in itself, yet one that cannot be overlooked. We refer to a heterogeneous movement consisting of the gradual incorporation of computational methods into research practice through the digitisation of methodological techniques.[6] However, this perspective did not necessarily imply or require self-reflection or the elaboration and/or incorporation of theoretical–conceptual frameworks (such as those present in the first approach) for this purpose. Rather, specialised software packages for research application were viewed more as "tools",[7] and their widespread acceptance as the replacement of "manual tools with computational tools".[8] This third approach thus corresponds to all those investigations and academic works that have used computer programs to carry out quantitative or qualitative techniques without requiring reflection on their use, design and implications, without drawing upon theoretical–conceptual frameworks that contribute to a greater understanding of their use and, in many cases, without the research necessarily being focused on or related to DTs and their effects across different dimensions of society.

As with the theoretical–conceptual and analytical approaches addressing the impacts of DTs, the introduction and widespread adoption of these software packages and their potentialities is shaped by the technological advancement of their time. Created in the 1960s and 1970s, the first computer programs applicable in social research were almost entirely those that could perform quantitative tasks, principally digitisation of databases and survey results, cross-tabulations, regressions and statistical relationships, and digital graphics, among others, with OSIRIS, BMDP (Bio-Medical Data Package), SPSS (Statistical Package for the Social Sciences) and SAS (Statistical Analysis System) being particularly prominent. In the mid-1980s, they were joined by another computer program that remains important to this day: STATA. Conversely, the first software packages for qualitative techniques date mainly from the 1980s and 1990s, notably Ethnograph, Hiperqual, MAXQDA, T-Lab and NUD*IST (Non-numerical Unstructured Data Indexing Searching and Theorizing) – predecessor of today's NVivo – and ATLAS.ti, the latter equipped with tools focused on the principles of grounded theory.[9]

It is important to note that, beyond the existence of these computer programs, multiple factors shaped the ways in which they were introduced and incorporated into the social sciences and humanities. Given the scarcity of written sources, this historical account relies on testimonies from five key informants from different

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regions who experienced first-hand the incorporation of computer programs into their academic work and university curricula.

Firstly, availability and infrastructure were important factors to consider. When these software packages emerged, the vast majority of social sciences and humanities researchers either lacked the necessary equipment to use them or did not possess the knowledge and skills to do so.[10] In this regard, the absence of graphical interface operating systems – such as those popularised in the mid-1990s – was a major obstacle to the widespread application of these computer programs. Their use was intended for those with practical knowledge in the use of punched cards and, subsequently, programming and/or syntax development. For these reasons, in most cases an association had to be formed between researchers in the social sciences and humanities and systems engineering personnel – the latter would generate tables, variable cross-tabulations and statistical trends, while relying on the former for analysis and interpretation. While many of these collaborations were fruitful, there were also frequent communication and interpretation problems between the two sectors (Colombrans, 1999).

Likewise, the process of incorporating these software packages differed across regions. According to the testimonies collected, these computer programs were introduced into social sciences and humanities university curricula in Europe and the United States by the mid-1980s (especially in sociology), gradually spreading to academic and private practice. In Latin America, by contrast, this occurred in the mid- to late 1990s, and the strategic alliance with the IT sector has continued to the present day. Differences in computer equipment availability and processing capacity between regions also help explain these variations.

Secondly, it is important to understand that, beyond being interpreted as "tools", the design features of these software packages played an important role in how they were incorporated and used. In the 1980s, the software enclosure movement (Gendler, 2023)[11] also affected these computational developments, preventing users from accessing the code, modifying or adapting it for specific needs, and generating new versions. This restricted use not only to the technical characteristics imposed by companies but also made it dependent on purchasing licences.

These issues are significant. Over two decades, social and human scientists had to gradually acquire substantial technosocial knowledge about using these computer programs in their academic and professional practice, and this became almost essential by the beginning of the 2000s. While their use expanded information processing capabilities, accelerated timelines and improved collaborative work possibilities, their closed-source and proprietary nature also guided and limited many research possibilities and practices.

5. Reflective Computational Approaches: Computational Social Sciences and Digital Humanities

Kirschenmaum (2012), Gold (2012) and Zhang *et al.* (2020) argue that methods and software packages introduced into social sciences and humanities research from the early 1960s onwards established a distinctive new field within these disciplines. Within the humanities, discussions began opening up from the late 1980s about whether the use of DTs made it possible to conceive of a new disciplinary branch. In these exchanges, various approaches and reflections were gradually incorporated into practice with computer programs, particularly around the scope, perspectives and problems that the use of these DTs brought to their work (Chow, 2015). After two decades of discussions, conferences and exchanges, this movement adopted the name "digital humanities" (DH) by consensus (Chow, 2015; Kirschenmaum, 2012), defining itself not only as a common methodological and epistemological perspective linked to DTs, but also as a social enterprise, an attractive element for investment and funding, with a long shared trajectory (Gold, 2012).

In contrast, computational social sciences (CSS) followed a different path. Most authors agree that CSS originated in 2009, with the publication of the eponymous article in the journal *Science*. In it, the authors – recognising the new leap in scale of datafication after the great expansion of the internet in the mid-1990s, the emergence of web 2.0 in the early 2000s (Gendler, 2024; Gualda, Taboada Villamarín and Rebollo Díaz, 2023) and other means of obtaining information such as sensors, public statistics and GPS (Gualda, 2022) – argued that the availability of massive data volumes provided the social sciences with new opportunities to enhance their disciplines, as had happened with biology, physics (Lazer *et al.*, 2009) and business intelligence (Gualda, 2022). They highlighted the potential of working with "data that represent/indicate the reality of what people do", complementing data obtained through more traditional techniques such as surveys and interviews, which mostly are "data that reflect what people declare, not necessarily what they do" (Giles, 2012). They further argued that technology companies such as Google and Facebook were already conducting CSS work, necessitating engagement from academia and universities. However, authors such as Zhang *et al.* (2020) dispute this "origin milestone", arguing that CSS can already be observed in the early incorporation of software packages into social science research practices in the early 1960s. For these authors, the paper by Lazer *et al.* (2009) defined and popularised CSS but did not found it. Instead, it continued pre-existing movements around data-based CSS, with the processing of large volumes of data at its core.

Beyond these controversies, this section proposes a *different* approach to the instrumentalist one. In our perspective, the central characteristic of CSS and DH is not merely introducing and massively using new computational techniques – mainly for collecting, treating, processing, analysing and

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validating large volumes of data – but also producing and deploying new concepts, theories, reflections, approaches, discussions and even a new epistemological paradigm about the scope, opportunities, limitations and challenges of their introduction (Conte *et al.*, 2012; Chow, 2015). As Conte *et al.* state in their "Manifesto of Computational Social Science":

> […] it is clear that naive or brute-force incorporation of large-scale data into simulation models may not lead to the expected results in terms of achieving relevant progress in social science. […] In conclusion, computational social science, as a rapidly developing and successful field, needs to be aware of the necessity to develop its theoretical premises, and to test them. Much as physical theories and models are tested through incredibly large experiments (such as the LHC at CERN), progress in computational models of social phenomena will only be possible by a sensible combination of data input, experimental work, and theory devising (2012, pp. 342–343).

This issue is key. It enables – beyond the differences in the computer programs used – a clearer distinction between the instrumentalist approach and the reflective computational approach. The latter, comprising CSS and DH, shares a dual focus in its engagement with digital technologies: on the one hand, the introduction of new computational techniques; and on the other, a self-reflective practice and theoretical–conceptual production surrounding these techniques and their disciplinary implications. In other words, CSS and DH not only incorporate computational software typical of the second wave of informational capitalism (Gendler and Girolimo, 2025) – strongly linked to social data, large data volumes (big data), small volumes of specialised data (small data) and new artificial intelligence models – but also produce, reflect upon and elaborate theoretical–conceptual frameworks. These frameworks operate at a lower level of abstraction than those in the first approach discussed in this article, yet they give meaning, direction and recursive capacity to their research lines and tasks.

However, this general definition requires examining the specificities of this new type of link with DTs. The software and DTs used by CSS and DH have different characteristics compared to those used by the instrumental approach.

Firstly, during the 1990s most software applied in social research was proprietary and closed-source. Specialised open-source or free software packages existed, but their presence was limited. However, this changed in the early 2000s. The free software and culture movements gained momentum at the beginning of this decade, operating with a collaborative logic aimed at co-creation (Gendler, 2023). This was reflected in greater promotion of specialised programs with these characteristics. The R programming language emerged in the mid-1990s as a free and open-source tool, but gained widespread use in universities and research centres only in the 2000s,

especially in the social sciences. This growth partly stems from the emergence of R Commander, a specialised graphical environment for statistical use developed by the Department of Sociology at McMaster University (Fox, 2005). The popularisation of R and its various toolkits was also nurtured by researchers around the world who collaboratively created different packages with distinct functionalities, including highly efficient tools for collecting, processing and analysing large volumes of data. This process peaked in the early 2010s with the emergence and popularisation of the RStudio integrated development environment, which facilitated and encouraged collaborative creation and use (Llaudet and Imai, 2024). In parallel, the free Python programming language, created in the early 1990s, also gradually gained popularity, spreading first among engineers, economists and data scientists. In the 2010s, with the creation of packages such as *Pandas*, *Jupyter* and the different notebooks, it became widely used in the social sciences and humanities (Trillin, 2018). Gephi, another open-source software package that was first released in 2008, is used mainly for network visualisation and analysis.

Secondly, CSS and DH gradually incorporated various developments in the field of artificial intelligence – mostly machine learning, but also deep learning and natural language processing (NLP) – that were launched and popularised in the early 2000s. Gualda, Taboada Villamarín and Rebollo Díaz (2023) and Zhang *et al.* (2020) note that incorporating these tools was fundamental to expanding the explanatory and predictive capabilities of these computational disciplines, especially when working with large volumes of data. Supervised learning techniques (such as decision trees, Bayes classifiers, random forests and support vector machines [SVMs]) and their unsupervised counterparts (such as linear discriminant analysis [LDA], expectation-maximisation algorithms, k-means clustering and word embedding models) significantly broadened these disciplines' fields of work. Researchers also constructed data-driven simulation models (Conte *et al.*, 2012). More recently, large language models (LLMs) and prompt engineering have deepened work with AI in the 2020s. Application topics include studying human characteristics, behaviours and actions; predicting and modelling these behaviours; and identifying influencing factors and consumption patterns. They also include analysing digitised written media for key terms and topics; establishing and developing networks; analysing discourse, political image and public opinion; examining mutations in community structure and behaviours; measuring levels and directions of social interaction; and studying emerging social processes and multilevel interactions (Zheng *et al.*, 2020).

A final clarification is needed regarding this approach. Despite the similarities emphasised in this section, CSS and DH differ in important ways. They have different backgrounds and comprise different disciplines with distinct approaches. They also introduced AI-based computational methods differently. CSS (especially sociology) more commonly focuses on predicting,

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analysing and classifying large volumes of data (big data), while DH works more with smaller, specialised data volumes (small data) and emphasises techniques such as digital ethnography, digitised analysis of literary corpora, geographic information systems, gamification and interactive narratives (Gualda, Taboada Villamarín and Rebollo Díaz, 2023; Chow, 2015). However, CSS and DH increasingly overlap and exchange ideas, and are often treated together due to their strong similarities (Romero Frías and Sánchez González, 2014; Caro *et al.*, 2020; Gefen, Saint-Raymond and Venturini, 2020). Despite acknowledging their singularities and differences, this article views both as part of the reflective computational approach because they share two key characteristics: they use advanced computational methods from the second wave of information, strongly linked to data analysis, and they produce theoretical–conceptual elaborations and reflections on the potentialities, implications and problems of these methods.

6. Categorisation of Approaches to Links: A Synthesis

Table 1 summarises what has been discussed so far.

Table 1

Categorisation of approaches linking the social sciences and humanities with ICTs and DTs

	Linking social sciences and humanities with DTs	Focus	Short definition	Approximate emergence
1	Theoretical–conceptual approaches	Changes in macrosocial configurations in connection with the widespread adoption of ICTs and DTs.	Theoretical–conceptual elaborations that address and problematise structural changes in the capitalist system linked to ICTs and DTs, their motivations, their socio-technical, economic, political and cultural effects, and associated continuities and discontinuities.	1950–1990 (pioneering research), 1990–2008 (first wave of information research), 2008–present (second wave of information research).
2	Analytical approaches on the impacts of ICTs and DTs	Impacts and effects of the introduction and penetration of ICTs and DTs across the different social dimensions.	Addresses the effects and problems arising from the introduction and expansion of ICTs and DTs, focusing mostly on a specific dimension (education, work, sociability, health, tourism, social assistance, management of production processes, social protest, etc.). Draws on theoretical–conceptual elaborations. Can generate its own concepts but with a lower level of abstraction.	Mid-1990s, became popular from the early 2000s due to increased presence of DTs and the internet across social dimensions.
3	Instrumental approaches	Introduction of computer programs to carry out research tasks.	This "non-approach approach" focuses on incorporating computer programs for social research tasks, classifying them as "tools". Does not necessarily elaborate or draw upon theoretical–conceptual frameworks linked to DTs, nor is investigating their effects essential. Instrumental approach, widely disseminated. Mostly uses closed-source/proprietary software.	Incorporation of these software packages dates mainly from the 1960s and 1970s, achieving widespread adoption and popularisation between the 1980s and 1990s.
4	Reflective computational approaches: computational social sciences and digital humanities	Introduction of new-generation computer programs, together with theoretical–conceptual elaborations and reflections on their implications, effects and scope.	This approach incorporates software packages typical of the second wave of informationalism, mostly open-source or free software, working with data volumes (big data and small data) and AI tools (ML, DL, NLP) to increase the potential for prediction, explanation and simulation of social phenomena. Includes theoretical–conceptual elaborations (of a lower level of abstraction and complexity than those of the first approach), reflections and debates on the effects, scope and implications of using these specific software packages.	Early 2000s thanks to availability of collaborative free software, new volumes of available data and developments in AI. Increased popularity from the 2010s. In-depth studies from the 2020s incorporating LLMs and prompt engineering.

Source: own research.

The proposed categorisation of approaches concerning social sciences' engagement with DTs is not intended to close debates but rather to provide a framework that might help advance and structure them. This proposal acknowledges that several points of contact may exist between the different approaches. The approaches that analyse the impacts of ICTs and DTs connect with theoretical–conceptual approaches when researchers draw upon theoretical frameworks to study technology effects in particular dimensions. Conversely, theoretical–conceptual elaborations are often informed by research into the impacts of DTs, which prompts new theoretical adaptations and reworkings. Instrumental and computational approaches can also be combined with and connect to those focused on theoretical–conceptual elaborations and those that analyse the impacts of DTs. For example, research might draw on theoretical–conceptual frameworks about the current informational age (first approach), analyse the effects of DTs in a specific social dimension (second approach) and apply first-wave computational techniques (such as SPSS, STATA, Atlas.ti and NVivo) without reflecting on their use, implications or scope (third approach). Alternatively, the same type of research might instead apply second-wave computational techniques (such as RStudio using the tidyverse package or Python using Pandas) and include reflections or theoretical frameworks on their use, implications and scope (fourth approach).

7. Open Thoughts

This article has traced how the social sciences and humanities have interacted with ICTs and DTs, proposing a typology of these relationships. This allows us to reflect on several fundamental issues.

Firstly, instrumental and reflective computational approaches appear almost incompatible as they use different types of programs and differ fundamentally on whether critical reflection is necessary. However, even early instrumental research often included some paragraphs or sections justifying the use of computer programs that complement or replace manual quantitative or qualitative techniques, citing specialised literature as validation. But this justification was purely operational, fitting within the instrumental perspective that this stream maintains towards computer programs – it did not reflect on their characteristics, scope, opportunities or problems. Over time, the habitual use of specific software packages in CSS and DH could also fall into this instrumental perspective. Researchers might stop justifying their use and, more importantly, stop incorporating the necessary critical reflections. This is a risk that deserves our attention.

Secondly, readers may have noticed potential subcategories within the proposed approaches. The theoretical–conceptual approach can be divided according to socio-historical stage: pioneering studies, first informational wave and second informational wave. The analytical approach on the impacts of ICTs and DTs

might include subcategories based on combinations of dimensions addressed, or on approaches to the effects of technology penetration using other theoretical–conceptual frameworks not specialised in these technologies.[12] Another division could include work that focuses on the effects of DTs but examines multiple dimensions rather than restricting analysis to a single area, attempting a more comprehensive approach. Additional subcategories might examine actors, roles, contexts and impacts at lower abstraction levels than the theoretical–conceptual approach. Examples include Science, Technology and Society (STS) studies, Discourse Analysis and the Political Economy of Communication, among many others.[13] The instrumental approach might be divided by separating quantitative from qualitative software, proprietary from free software, or by analyses that include reflections on non-instrumental use of computer programs. The reflective computational approach could be divided between CSS and DH, by studies with more instrumentalist tendencies, or by objective (prediction, explanation, simulation), among other possibilities. In this sense, this article aims to establish foundations for a theoretical–conceptual and methodological tool that contributes to studying the broad field of links between social sciences, humanities and DTs. All these possibilities for expansion (and others not mentioned) are welcome.

Thirdly, the socio-technical context – both technological availability (general software packages, specific programs, equipment, infrastructure, etc.) and reflection and analysis of the presence and impacts of ICTs and DTs – is crucial, as it is inseparable from all the approaches deployed. Greater existence, circulation and popularisation of technologies increase both their effects on society and interest in studying them. Greater capacity and socio-technical disruption also open new forms of approach and analysis. In any case, the technologies themselves should also be studied: their characteristics, the actors who create and drive them, and whether their code is proprietary/closed or free/open. These are central elements requiring contemplation and analysis, yet they are often ignored.

This raises another important point. Since the 1970s, many academic works have "run after the latest novelty" without considering the history of the technologies addressed, the actors involved and their power relations, geopolitical issues, or the operation and design characteristics of the ICTs or DTs in question – all fundamental for comprehensive study. Similarly, socio-technical innovation has often dominated research themes, methods and approaches, both in trends and funding. This has sometimes led to research using "advanced" computer programs when the research does not require them or, worse, limiting research impacts and objectives to enable use of these technological developments. This is why self-reflection and specific, constant work on computational methods are defining features of CSS and DH – and why they must be preserved. Without them, these approaches risk relapsing into instrumentalism that undermines their potential.

Finally, the geographic location of research is a key factor. Across all approaches, research conducted in the Global North–particularly in the United States and

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Europe–has consistently shaped research agendas in the Global South (Latin America and elsewhere). As a result, the Global South has relied heavily on the Global North for theoretical–conceptual and epistemological frameworks, computer programs and their possible applications. This occurs for two reasons. First, ICTs and DTs are more available and circulate more widely in the Global North. Second, launches and developments are rolled out there first, creating the socio-technical framework that promotes research and usability before reaching the Global South later. Nevertheless, once technologies reach the Global South, rich academic production emerges with different contexts, cases, particularities and interpretations. However, this Global South production often remains invisible to the Global North. This issue is not unique to ICT and DT studies – it is historical. But perhaps these fields offer an opportunity to develop more bilateral relationships.

This article has examined the state of affairs and proposed a theoretical–conceptual and methodological framework for understanding links between the social sciences, humanities and DTs. Future research – our own and, hopefully, others' – must continue to expand, modify, rework, specify and optimise what is presented here to contribute to this necessary and urgent framework of approaches.

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Notes

1 This methodological strategy was necessary due to difficulties accessing written records of the inclusion of computer software in the social sciences and humanities between the 1960s and 1990s. Five experts from different regions were consulted, all with extensive experience, to complement and deepen information about these periods and processes. They were selected for having experienced these processes directly, with careful consideration given to achieving gender and geographic balance. Their testimonies provide informative context to this article.

2 These will later be described as the instrumental and reflective computational approaches of the present work.

3 In the first decades, this may have stemmed from a disconnect between the social sciences and humanities regarding these computer programs. However, even after their popularisation from the mid-1990s onwards, their use by works in this approach remains largely limited.

4 Mainly those that compose the instrumental approach of this article, presented in the next section.

5 Work on the impacts of social media, digital platforms and generative artificial intelligence across different dimensions provides a good example.

6 This shift occurred alongside the introduction of other less specialised but equally important computer software: word processors, spreadsheets and digitised slides, among others. These became massively popular over the decades, becoming quasi-essential requirements between the late 1990s and early 2000s.

7 This instrumental view of technology (Parente, 2010) has its own origins and involves various complexities. Taking technical development as a "neutral" instrument that can be given "good or bad use" can obscure many of its differential characteristics, design biases and even its political nature. This is important because even the most reflective sciences – the social sciences and humanities – accepted and were influenced by this utilitarian approach.

8 Although initially some explanatory framework was needed regarding the software used and its advantages and limitations compared to manual practice, its use gradually became naturalised. This detail became almost irrelevant, particularly for the most popular software.

9 "Atlas.ti [is] the main computer tool for developing grounded theory. This program was designed in the late eighties by the German Thomas Murh, who resorting to technology

made an attempt to apply the methodological approaches of Glaser and Strauss" (San Martín Cantero, 2014, p. 114; own translation).

10 This is interesting to reflect upon, as it parallels what is currently happening with generative artificial intelligence models, both regarding subscription costs for premium versions and the techno-social skills around their use and appropriation.

11 We refer to the process that took place at the beginning of the 1980s, in which shared access was gradually removed from computer program code, making it increasingly difficult to understand how software worked, modify it or distribute new versions. This is when proprietary software emerged as a category. In response, the Free Software Foundation (FSF) was established in 1985 to promote free software as an alternative.

12 This case has become increasingly prominent since the COVID-19 pandemic made considering the ICT and DT dimension almost indispensable when analysing multiple fields of study.

13 Many readers might consider this potential subcategory as a distinct approach, something worth exploring in future work.

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DEBATE/DEBATE: BEYOND BIG DATA: GENERATIVE AI AND LLMS AS NEW DIGITAL TECHNOLOGIES FOR ANALYSING SOCIAL REALITY/
MÁS ALLÁ DEL *BIG DATA*: IA GENERATIVA Y LLMS COMO NUEVAS TECNOLOGÍAS DIGITALES PARA EL ANÁLISIS DE LA REALIDAD SOCIAL

LLMs and Coding in Qualitative Research: Advancements and Opportunities for Social Verbatim as an Integral Qualitative Tool

Los LLM y la codificación en la investigación cualitativa: avances y oportunidades para Social Verbatim como herramienta integral cualitativa

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ABSTRACT

This article examines the use of large language models (LLMs) in qualitative coding, highlighting key advances and emerging opportunities for the Social Verbatim tool. It reviews the theoretical foundations of LLMs, their underlying architecture and the role of hardware developments in their evolution. The article explores specific applications of LLMs in qualitative research, including thematic coding and comparative analysis. It also addresses methodological, ethical and epistemological challenges, proposing strategies to mitigate these risks. Finally, it considers the implications of integrating LLMs into platforms such as Social Verbatim, underscoring the importance of transparency and human–machine collaboration in the context of qualitative inquiry.

KEYWORDS: Large language models (LLMs); qualitative coding; generative artificial intelligence (GenAI); qualitative research; open science; AI-assisted qualitative analysis.

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RESUMEN

Este artículo explora el uso de Modelos de Lenguaje de Gran Escala (LLM) en la codificación cualitativa, destacando avances y oportunidades para la herramienta Social Verbatim. Se revisan los fundamentos de los LLM, su arquitectura y el impacto del hardware en su desarrollo. Además, se analizan aplicaciones específicas de los LLM en la investigación cualitativa, incluyendo la codificación temática y el análisis comparativo. Se abordan los desafíos metodológicos, éticos y epistemológicos, y se proponen estrategias para mitigar estos problemas. Finalmente, se discuten las implicaciones de la integración de LLM en herramientas como Social Verbatim, subrayando la importancia de la transparencia y la colaboración humano-máquina en la investigación cualitativa.

PALABRAS CLAVE: modelos de Lenguaje de Gran Escala (LLM); codificación cualitativa; Inteligencia Artificial Generativa (IAG); investigación cualitativa; ciencia abierta; análisis cualitativo.

1. Introduction

Over two years of work on a project known as CS-Transcribe,[1] one of the principal outcomes has been the development of an online tool registered as Social Verbatim. This application has been conceived as a digital solution for various stages of the qualitative social research process, and it is progressing towards becoming a comprehensive support tool for this type of research. In addition to transcription functionalities, it incorporates features related to data management, and to analysis and coding support. As detailed on its website (www.socialverbatim.com[2]), Social Verbatim not only allows automatic or manual transcription but also the integration of non-verbal and contextual communication through icons, the review and correction of transcripts, team collaboration, project and interview organisation, the structuring of focus groups or other analytical elements, anonymisation of excerpts and the insertion of comments, bookmarks and analytical notes. It also enables the use of verbatim transcripts for publication purposes, among other functionalities.[3]

In line with efforts to expand the tool's capabilities, this article explores the potential application of large language models (LLMs) in the qualitative coding process. This work aims to assess the recent advances in AI-driven qualitative coding, as well as the challenges and opportunities posed by this type of technology. Special attention is given to the role of researchers as active and necessarily reflexive agents within the process.

Before reviewing the most significant contributions in this field, the concept of LLMs is first introduced. LLMs are artificial intelligence models designed to process and generate natural language text on a large scale. According to Mitchell (2024):

> A large language model (LLM) is a computational system, typically a deep neural network with a large number of tunable parameters [...], that implements a mathematical function called a language model. [...] The neural networks underlying LLMs are trained using broad collections of text typically obtained from websites, digitized books, and other digital resources.

These neural networks constitute a computational model inspired by the human brain, comprising "neurons" (processing units) arranged in layers, which transform inputs (such as text or numbers) into outputs (such as predictions or responses).

In recent years, this technology has seen extraordinary advances, particularly following the introduction of the Transformer architecture, as proposed in a seminal paper by Vaswani *et al.* (2017). This architecture is capable of capturing long-range dependencies in text far more efficiently than earlier models such as recurrent neural networks (RNNs) or convolutional neural networks (CNNs). Prior to this innovation, language models were trained from scratch for each specific task. By contrast, Transformer models are pre-trained on large volumes of unlabelled data and subsequently fine-tuned for particular tasks.[4]

This new architecture is based on the self-attention mechanism (*Attention Is All You Need*), which enables the efficient processing of large volumes of text and the identification of relational patterns by assigning different weights to words within a sentence. LLMs convert words into numerical representations known as embeddings. These representations allow the model to associate similar concepts within a mathematical space, comparing each word with others to determine its relevance within a given sentence. The model assigns different weights to each word in order to better understand the overall meaning of the prompt – that is, the textual input or instruction provided by the user to elicit a response. Moreover, the Transformer architecture enables the simultaneous processing of all words through *parallelisation*. This innovation made it possible to train models containing billions of parameters without excessive increases in training time, thereby significantly enhancing scalability.

In addition to the development of the Transformer architecture, progress in hardware has played a critical role in the advancement of LLMs, particularly in three areas: a) the development of graphics processing units (GPUs), which accelerate the matrix and tensor computations essential in Transformer models; b) increases in RAM, since larger models require terabytes of memory to process data; and c) the emergence of AI-specific chips – such as tensor processing units (TPUs). Wang *et al.* (2019), for instance, demonstrated that TPUs offer significant advantages in terms of performance and energy efficiency compared to traditional GPUs, particularly for deep learning models such as Transformers. Without high-performance hardware, training times would be prohibitive, and real-time model deployment would be infeasible.

2. Generative Artificial Intelligence (GenAI) and LLMs in Qualitative Coding

All these advances have facilitated the introduction of methodological innovations that are capable of transforming – and indeed are already transforming – the ways in which social scientists engage with qualitative data (Hayes, 2025; Van Dis *et al.*, 2023). For Hayes (2025), this entails inhabiting a new "hybrid space" characterised by dynamic interaction with large-scale data and a conversational engagement with it through LLMs – a new relational model that lies somewhere between established qualitative traditions and the possibilities afforded by advanced computational capacities.

In any case, there is little doubt about the far-reaching impact this technology will have on how we conceptualise our world – and science itself. Nonetheless, in disciplines such as sociology, political science, economics and other social sciences, as Bail notes, the transformative potential of GenAI in research remains largely underexplored, despite the fact that "these tools may advance the scale, scope, and speed of social science research—and may enable new forms of scientific inquiry as well" (2024, p. 1).

The contributions of GenAI are already being extensively investigated in both *experimental or quasi-experimental* settings and, naturally, within qualitative research. Ziems *et al.* (2024) evaluated 13 LLMs and found acceptable levels of agreement with human coders. They concluded that, in contrast to supervised and manual text coding – which requires large volumes of human-annotated training data – LLMs present substantial opportunities, without the limitations of other unsupervised methods that often yield unintelligible results. Wu *et al.* (2023) analysed public statements made by elected officials and demonstrated that ChatGPT-3.5 can produce ideological classifications, with results closely aligning with the widely used DW-NOMINATE method for measuring ideology.

Hayes (2025) identifies several possible uses of LLMs for qualitative research, in addition to *basic orientation* within extensive and complex datasets. These include: a) *thematic coding*; b) *comparative analysis* across different texts, by highlighting differences in tone, emphasis or conceptual framing; c) *identifying internal dynamics within the data*, such as contradictions, tensions or evolving narratives within the corpus; d) *scenario testing and hypothetical exercises*; e) creative synthesis and stimulation of further inquiry; f) *reflexive engagement*; and g) less conventional uses of LLMs, such as the generation of storyboards, instructions or descriptive outlines.

The discussion below will focus on the first three of these, as they are embedded in the core nature of the coding process. To this end, we will first refer to the process in its more conventional sense. In the context of qualitative research, coding has occupied a central role, serving as a bridge between raw data and the construction of analytical meaning.

A code is thus a construct generated by the researcher that symbolises – and thereby assigns interpreted meaning to – individual data elements, for the purposes of pattern detection, categorisation, theoretical development and other analytical processes (Miles *et al.*, 2015, p. 78). Coding, in this sense, is the systematic process by which qualitative data (such as interviews, observations or texts) are organised, labelled and grouped in order to identify relevant patterns, themes or categories. Rather than conceiving of coding merely as a technical or preparatory task, there is considerable consensus around its character as a process of deep reflection – one involving the analysis and interpretation of data meaning (González-Veja, 2022; Deterding and Waters, 2021). Codes are used primarily – though not exclusively – to retrieve and categorise similar fragments of data, enabling the identification, extraction and clustering of segments relevant to a research question, hypothesis, construct or specific theme.

Coding, therefore, is a heuristic process that assists the researcher in exploring, discovering and understanding underlying patterns and themes within a dataset. In other words, coding not only structures information but also activates a process of reflection and analysis that leads to new interpretations or findings, functioning as a guide or discovery strategy in qualitative analysis.

Two types of coding may be distinguished: inductive (Glasser and Strauss, 1967) and deductive (Crabtree and Miller, 1999). The inductive approach consists of constructing patterns and themes from the bottom up, organising data into increasingly abstract units of information. By contrast, within a deductive logic, existing patterns and theories are compared with the data (Jiang *et al.*, 2021, p. 94). Although some approaches recommend avoiding prior conceptual frameworks when engaging with data, this does not appear to be a realistic proposition. In practice, a combination of both methods almost invariably occurs (Lindbergh and Korsgaard, 2019), which is plausible given the limitations of each approach when applied in isolation.

Social scientists have begun to use LLMs for text classification and, within this group, researchers in sociology in particular. LLMs can assist them in moving rapidly from an overarching view of thematic patterns to more specific aspects of human communication (Hays, 2025). Overall, there is a high degree of consensus that these models can be highly useful for data coding in qualitative research, although there are clear warnings regarding the importance of using them judiciously and with an awareness of their limitations, which will be addressed later.

LLMs perform natural language processing tasks, that is, without the need for prior task-specific training data. Unlike other GenAI models such as supervised machine learning, in which pre-labelled training data are provided (Molina and Garip, 2019), LLMs operate in a zero-shot mode – that is, without prior training for a specific task (Ziems *et al.*, 2024). In the former case, a "label" or category is assigned to each document (for example, an annotated tweet, a paragraph from a

news article or a fragment of a speech), and a model is then trained to automatically predict labels using textual features. Once trained, the model can predict labels for other similar texts, thereby automatically coding new documents.

In any case, LLMs are more than a promise. Indeed, they represent a tangible reality that is contributing to a renewed use of computational techniques in qualitative research by providing: a) *efficiency*, as they help to accelerate the coding process, particularly when working with large datasets; b) *consistency*, insofar as they can ensure uniform coding criteria, thereby reducing human bias and error; and c) *pattern analysis*, by identifying relationships within the data that may be difficult or impossible to detect through manual analysis.

3. LLM-Based Tools Used for Coding in Qualitative Analysis

Table 1 below presents several recent examples of studies (*first* column) that examine the use of LLMs as a means of qualitative coding. The table includes the type of coding applied – whether inductive or deductive (*second* column); the LLM configuration, specifically whether fine-tuning was employed, starting from a zero-shot approach (*third* column); and whether the study involved comparisons between different LLMs or between LLMs and human coders, typically experts (*fourth* column). As previously noted, prompt engineering refines the outcomes of coding by designing and optimising prompts to elicit more accurate, relevant and useful responses from language models. The table also provides information on whether a specific tool or methodology was developed (*fifth* column) and the specific model used for coding (*sixth* column).

Table 1

Use of LLMs in qualitative coding by coding approach, comparison method, tools and model applied

Source	Type of coding	LLM configuration	Comparison	Tool (app) or methodology	LLM used
Chew *et al.* (2023)	Deductive	Zero-shot (fine-tuning via prompt engineering)	With human coders	Methodology. LACA (LLM-Assisted Content Analysis). Code available on Figshare: https://figshare.com/articles/dataset/LLM-Assisted_Content_Analysis_LACA_Coded_data_and_model_reasons/23291147	GPT-3.5
Ziems *et al.* (2024)	Inductive	*Zero-shot*	Between models	Not specified	FLAN -5 (Small, Base, Large, XL, XXL), FLAN UL-2, GPT (3.5, 4), ada-001, babbage-001, curie-001, davinci-001, 002, 003

Source	Type of coding	LLM configuration	Comparison	Tool (app) or methodology	LLM used
Meng *et al.* (2024)	Deductive/ inductive	*Zero-shot*	Comparison between model-only and human-assisted outputs (in both coding approaches)	Methodology. CHALET (Collaborative Human–LLM Analysis for Empowering Conceptualisation in Qualitative Research). No dedicated software tool	GPT-4-1106-preview
Dunivin (2024)	Deductive / content analysis	*Zero-shot*	Between models / with human coders	Not specified	GPT-3.5 and 4
Xiao *et al.* (2023)	Deductive	Zero-shot (fine-tuning via prompt engineering)	With human coders	Not specified	GPT-3
Zhang *et al.* (2024)	Deductive/ inductive	*Zero-shot*	With humans / between models	Software. QualiGPT (open-access): https://github.com/KindOPSTAR/QualiGPT	GPT-4 and Claude 3.5
Zhao *et al.* (2024)	Inductive	Zero-shot (fine-tuning via prompt engineering)	Between models with and without fine-tuning	Software. A2C (Argument2Code) – proprietary software designed to enhance qualitative data analysis using LLM capabilities (not open-source)	Llama-2-13B-Chat
Tai *et al.* (2024)	Deductive	Zero-shot (iteration effects following prompts)	Comparison of outputs after 160 prompt-based iterations using the same input data	Not specified	GPT-3.5
Arlinghaus *et al.* (2024)	Inductive	*Zero-shot*	With humans / between models	Not specified	GPT-3.5 Turbo and GPT-4o
Dai *et al.* (2023)	Deductive/ inductive (thematic analysis)	Prompt-based frame discussions	With human coders	Methodology. Code available at https://github.com/sjdai/LLM-thematic-analysis	GPT-3.5
Qiao *et al.* (2025)	Inductive	Multi-agent LLM system (coders, aggregators and reviewers)	Comparison between single-agent and multi-agent models	Software. Thematic-LM (open-source): https://github.com/sjdai/LLM-thematic-analysis	GPT-4
Gao *et al.* (2025)	Inductive	Descriptive overview of the MindCoder tool	Not specified	Software. MindCoder. Available at https://mindcoder.ai Designed to bridge the gap between professional qualitative tools (e.g. ATLAS.ti, NVivo) and conversational LLMs (e.g. Claude, ChatGPT). Proprietary app (code not available)	GPT-4
Bryda *et al.* (2024)	Inductive	*Zero-shot*	Describes two coding strategies: generative and lexico-semantic	Not specified	GPT-4
Yang *et al.* (2025)	Inductive	Zero-shot (fine-tuning via prompt engineering)	With human coders	Not specified	GPT-4
Mathis *et al.* (2024)	Inductive	Zero-shot (fine-tuning via prompt engineering)	With human coders	Methodology. Code available at https://www.sciencedirect.com/science/article/pii/S0169260724003493?via%3Dihub	Llama 2-70B-Instruct (open-access)

Source: own research.

Given the applied aims of this article, the focus will be placed on specific software tools designed for qualitative coding (as shown in the penultimate column of the previous table), through which LLMs are implemented (as indicated in the final column). Accordingly, tools such as LACA (Chew *et al.*, 2023) and CHALET (Meng *et al.*, 2024) are excluded from this overview (Table 2), as they represent methodological frameworks that integrate LLMs – such as ChatGPT – into the qualitative coding process, whether deductive (LACA) or a combination of deductive and inductive (CHALET).

QualiGPT (Zhang *et al.*, 2024) is a tool based on language models (e.g. ChatGPT), designed to support qualitative data analysis. Although QualiGPT does not operate as a standalone programme – instead using the ChatGPT interface or, alternatively, allowing local installation in a Python environment via GitHub – it offers a customisable approach using language models (such as ChatGPT) tailored specifically to qualitative analysis. It is grounded in methodologies like inductive and deductive coding and draws on core principles of qualitative research, including grounded theory, thematic analysis and reflexive coding. This tool is oriented around principles of *transparency and reflexivity*, offering coding justifications, analytical commentary and decision traceability. Other notable features include its speed and responsiveness – with ChatGPT able to generate codes and themes within seconds or minutes – as well as the availability of automated workflows, which reduce the need for manual configuration. It also includes prompt templates inspired by peer-reviewed research.

MindCoder (Gao *et al.*, 2025) is a web-based application specifically developed for qualitative analysis. Its principal aim is to automate and streamline the qualitative coding process, providing an accessible tool for researchers without programming expertise. Through its intuitive and user-friendly online interface, MindCoder seeks to bridge the gap between professional AI-powered software tools (e.g. ATLAS.ti, NVivo) and conversational language models (like Claude and ChatGPT). It employs automated chains of reasoning based on the chain-of-thought (CoT) prompting technique, which enables structured qualitative analysis across stages such as data reprocessing, automatic open coding, automatic axial coding, conceptual development and report generation.

Table 2

Emerging software tools using LLMs for qualitative coding, according to selected criteria

Software tool	Input formats	Outputs	Interface	Open source	Web source
QualiGPT (Zhang *et al.*, 2024)	.csv, Excel, plain text	Tables, summaries, code lists	ChatGPT interface (OpenAI) or local Python installation	Yes (MIT License)	chatgpt.com/g/g-HtBvI9uXe-qualigpt github.com/KindOPSTAR/QualiGPT
MindCoder (Gao *et al.*, 2025)	.txt, .docx	Cluster diagrams, code labels, conceptual development, visual representations	Proprietary online platform	No (proprietary)	mindcoder.ai
Thematic-LM (Qiao *et al.*, 2025)	.csv, .json (with agent configuration options)	Thematic codes, codebooks, assignment to text segments, thematic maps, structured reports	Executed in programming environments such as Jupyter Notebooks or directly in Python	Yes	github.com/sjdai/LLM-thematic-analysis
Argument-2Code (Zhao *et al.*, 2024)	Not specified	Not specified	No dedicated interface – integrated into existing analytical workflows	No	Not specified

Source: own research.

Thematic-LM (Qiao *et al.*, 2025) is a computational thematic analysis system designed to perform thematic coding by assigning specialised tasks to individual agents (components of the system), such as coding, code aggregation, and the maintenance and updating of the codebook. This architecture enables a more efficient and scalable approach, capable of handling large volumes of data without compromising performance. It is intended for researchers with programming expertise and access to LLM APIs, as users are required to execute scripts and manually configure system parameters. This involves: a) preprocessing the data; b) defining how agents are invoked (e.g. coder, aggregator); and c) specifying how results are stored and visualised.

Argument2Code (Zhao *et al.*, 2024) is a sophisticated automated system developed to generate inductive codebooks and extract emerging themes without the need for a predefined theoretical framework. It employs a multi-stage process based on chain-of-thought prompting – a technique that guides the model through a series of logical steps to improve coherence and depth in code generation. This approach supports a more open and flexible exploration of the data, enabling the identification of patterns and key concepts directly from the analysed content.

In summary, the use of LLMs in qualitative coding has led to the emergence of a diverse range of approaches and tools that introduce automation – and, consequently, an unprecedented level of speed – into the qualitative analysis process. In particular, software tools such as QualiGPT, MindCoder and Argument2Code illustrate a growing effort to integrate the advanced capabilities of LLMs into environments that are both accessible and methodologically grounded.

Nevertheless, other tools – such as Thematic-LM – present greater technical complexity in their implementation, despite being open-source. In some cases, including Argument2Code, the available information remains limited, as no web or desktop interface is provided and the source code is not publicly accessible. Ultimately, these tools point to a significant transformation in qualitative coding practices, offering new opportunities while also raising challenges related to transparency, human oversight and critical interpretation – issues that will be addressed in the following section.

4. The Challenges of LLMs

The use of LLMs in qualitative research has attracted increasing interest, while simultaneously posing important methodological, ethical and epistemological challenges. As these tools are progressively integrated into data analysis processes, it becomes essential to critically reflect on their limitations – particularly with regard to the transparency of their operations, the reliability of their outputs and the potential influence of biases inherited from their training datasets. Several authors have warned that, although GenAI may offer innovative solutions for task automation and the identification of patterns in large-scale datasets, its use requires caution, both due to the risk of reproducing social and cultural biases, and because of ethical dilemmas related to data privacy and the replicability of research findings. What follows is a summary of some of these limitations, as highlighted in recent studies.

Morgan (2023) identifies several key concerns regarding the application of GenAI to qualitative analysis. The first relates to racist, sexist or other forms of bias that may arise due to limitations in the training datasets, which are typically sourced from internet content (itself replete with various forms of structural bias). For instance, the developers of ChatGPT have reported substantial efforts to train the model to detect and exclude such biases, both in the queries it accepts and in the responses it produces. In theory, these risks could be mitigated through careful prompt formulation. However, Morgan also notes that this bias-filtering capability may itself become problematic when the objective of the research is precisely to examine such biases – a frequent aim in qualitative inquiry.

A second limitation concerns the model's potential to generate inaccurate or nonsensical content, a phenomenon often referred to as "hallucination" (Lakshmanan, 2022). 0As the tool itself acknowledges when questioned about its reliance on probabilistic language prediction: "the model generates responses based on the probability that a sequence of words is coherent and relevant, but not necessarily correct, as this probabilistic approach prioritises fluency and coherence over factual accuracy" (ChatGPT, v4, 2024).

A third concern involves ethical considerations, particularly regarding access to private data, including during model training (Marshall *et al.*, 2024; Head *et al.*, 2023). Unless data are adequately anonymised, the reuse of participant information may compromise individual privacy. Moreover, although there is no documented evidence of ChatGPT or similar systems having been compromised, full guarantees of data protection cannot be assumed under all future scenarios (Morgan, 2023).

Meng *et al.* (2024) identify several challenges that QualiGPT appears to address effectively:

a. Lack of transparency. The "black box" nature of LLMs makes it difficult to understand how data are processed, highlighting the need to improve interpretability and transparency.

b. Issues of consistency and contextual understanding. Responses may vary, and maintaining coherence across multi-turn dialogues is challenging. Structured and precise prompts can help improve consistency.

c. Challenges in prompt design. Crafting effective prompts is time-intensive and lacks a standardised methodology. QualiGPT mitigates this by providing predefined prompts that streamline the process.

d. Difficulties in interpreting LLM outputs (e.g. in the case of ChatGPT). Prompts can be designed to standardise outputs and enhance readability.

e. Data privacy and security concerns. In the digital era, data privacy remains a critical issue, particularly when using language models. There are significant risks of sensitive data exposure, as demonstrated by past incidents.[5]

Meng *et al.* (2024) emphasise the need for robust prompt engineering when deploying LLMs for qualitative coding. OpenAI co-founder Greg Brockman defines prompt engineering as "the art of communicating eloquently to an AI".[6] Rossi explores the implications of prompt variability for the reproducibility of results. The researcher describes prompt engineering as "a process of fine-tuning to obtain optimal outputs from an LLM" (2024, pp. 155–156), but questions the assumption that identical prompts will consistently generate identical – or even similar – outputs. Output instability is a known characteristic of LLMs, as minor variations in prompt wording, or repeated use of the same prompt at different times, can yield divergent results.

One area for future development is the creation of LLMs specifically designed, trained and optimised for research applications (Bail, 2024). In this context, open-source language models are widely regarded as the most viable alternative (Spirling, 2023), as they provide greater transparency, enhanced control and the possibility of training with research-specific datasets.

A significant limitation, however, is the technical barrier posed to researchers – particularly sociologists and other social scientists – with limited computational expertise. While efforts have been made to address this through step-by-step user guides for LLMs (Törberg, 2023), integrating these models into more intuitive interfaces tailored to qualitative research would enhance their accessibility and usability.

Lastly, practical considerations remain regarding the pace at which such technologies are adopted within academia. As Marshall *et al.* observe, the cautious stance taken by some may affect publication outcomes: "[…] there will be some who choose to wait to adopt its use and these individuals will still be reviewers for academic journals or referees for conference submissions – and this will continue to impact qualitative researchers […] the results of our survey suggest that many reviewers […] are less likely to accept a paper that reports research using AI" (2024, p. 98). This illustrates one of the unintended consequences of the current transition to AI-assisted methodologies.

In summary, the principal limitations of AI in qualitative research include its inability to interpret the deeper meaning of data – a process that requires thorough contextual and theoretical understanding; its potential to perpetuate rather than correct existing biases; and its lack of transparency, as LLMs cannot provide insight into their decision-making processes, raising important concerns about transparency and accountability.

5. The Role of the Researcher in Relation to LLMs

Although LLMs can process language with impressive fluency by leveraging vast repositories of information, they lack genuine understanding, self-awareness and the capacity to reason about the world in the way that humans do (Mitchell, 2023). Precisely for this reason, human judgement, critical interpretation and subject-matter expertise remain fundamental for guiding and validating research supported by LLMs. In similar terms, Jiang *et al.* (2021) note that while researchers often struggle with the complexity and uncertainty of qualitative analysis, they strongly value full autonomy over the process and insist that this autonomy should not be compromised by AI systems.

While the relationship between researchers and LLMs is generally viewed as one of complementarity, this nonetheless calls for a reconceptualisation of the researcher's role. Researchers are increasingly expected to engage in critical reflection based on computational outputs (Li *et al.*, 2024) and to retain responsibility for interpreting findings, evaluating model-generated suggestions through the lens of disciplinary expertise and the empirical realities under investigation. In this regard, Christou (2023) proposes a relationship grounded in the principles of *rigour*, *reliability*, *justification* and *ethics*, ensuring that researchers actively apply their evaluative and cognitive skills to monitor processes, document

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decision-making and reach substantiated conclusions. Similarly, Schreder *et al.* (2025), drawing on insights from qualitative researchers familiar with LLMs, emphasise the need for tools that support tasks such as coding – while insisting that this support must be accompanied by a *strongly reflective* and interpretative stance.

Following Christou (2023), a series of key recommendations can be made concerning how researchers should engage with data in an LLM-supported context: a) achieving comprehensive familiarity with the dataset to understand it in its entirety and detect any inherent biases or assumptions; b) ensuring that training data are diverse and unbiased, and implementing safeguards to promote transparency and accountability; c) verifying all AI-generated content through cross-referencing to ensure its accuracy and credibility; d) carefully reviewing outputs prior to engaging in theoretical or conceptual analysis; and e) actively contributing to the interpretative process by applying prior and in-depth knowledge of the phenomenon under investigation.

In light of these considerations, a key question emerges regarding the design of tools intended for researchers. In this respect, Schreder *et al.* (2025) argue that tools incorporating LLMs should be developed in accordance with a set of guiding principles, which are presented in Table 3.

Table 3

Design of LLM tools according to purpose, based on Schreder et al. (2025)

Participant privacy	For intentional use	To enhance transparency and validation	For deeper engagement with data
More tools should support local hosting, personalisation and fine-tuning of open-source models.	Control over when and how users are assisted or influenced by AI.	Ability to evaluate performance transparently.	Tools based on LLMs should reinforce researchers' engagement with data (rather than distancing them from it).
Open-source code as a potential solution to privacy issues, and for greater control and transparency.	Flexibility and interactivity. Chat-based LLMs enable, but *do not yet fully support*, intentional use for specific tasks within the research process.	Useful features for positivist approaches include ensuring reproducibility of results, inter-rater reliability (IRR) and annotation error analysis.	Concern regarding the variable performance of LLMs across different contexts, domains, cultures and languages.
Tools should clearly indicate whether they use external APIs, and if so, when and how.	Tools should be designed to guide users in selecting appropriate and intentional uses of LLMs.	Include features to help users interpret and analyse results and suggestions.	LLMs as a means to generate more distinctive approaches to understanding data, helping researchers examine or challenge existing theories using evidence directly drawn from the data.
Obligation to inform users, prior to uploading data, about how privacy is managed: how data can be anonymised, how it can be deleted and whether inputs are used to train models.	Tools should enable researchers to develop their own ideas.		Design should take into account participants' perspectives and interests.
			Provide the option to use models that better reflect a target group.
			Possibility to incorporate the researcher's own context into the analysis, including prior experience, influential texts and theoretical frameworks.

Own research.

Following an in-depth evaluation of various LLMs – including several versions of FLAN-5 and ChatGPT (versions 3 and 4) – Ziems *et al*. (2024) conclude that while these models can enhance traditional processes, they should not be seen as a substitute. They put forward several recommendations aligned with the following principles: a) improving data labelling processes, particularly when managing large datasets; b) ensuring flexibility to adapt and customise models according to specific research needs, while maintaining ethical oversight; c) prioritising fidelity, relevance, coherence and fluency by selecting larger instruction-tuned models aligned with human preferences; and d) favouring the use of open-source LLMs for classification tasks, as opposed to relying on proprietary or closed-source models.

On the importance of open-source tools, Van Dis *et al.* (2023) highlight one of the most pressing challenges facing researchers using LLMs – namely, the quasi-monopolistic environment in which these models operate. LLMs are typically proprietary technologies developed by a small number of large technology companies

with the financial and technical capacity to drive AI development. This concentration of control raises considerable ethical concerns (ibid.), particularly regarding the lack of transparency. As the authors warn, "tech companies might conceal the inner workings of their conversational AIs", which "goes against the move towards transparency and open science, and makes it hard to uncover the origin of, or gaps in, chatbots' knowledge [...]" – thereby underscoring the need for "the development and implementation of open-source AI technology" (ibid., p. 225).

Ultimately, the use of LLMs in qualitative research demands a careful balance between automation and human oversight, between efficiency and critical reflection, and between assistance and researcher autonomy. It is crucial, therefore, to acknowledge the active role of the researcher as coder, even within LLM-assisted environments, in order to avoid the illusion of total automation or the fallacy of *algorithmic neutrality*. AI-based tools must not supplant the researcher's judgement, but rather support it within a framework that is methodologically rigorous, ethically sound and transparently documented. As the reviewed literature suggests, the development of such systems should be guided by principles of openness, contextualisation and user-centred design, ensuring that technology enhances – rather than constrains – the interpretive, analytical and creative capacities of researchers.

6. Open Science, LLMs and Qualitative Research in Social Verbatim

It has been suggested that generative AI, in the social sciences as well as in many other disciplines, will open "revolutionary avenues for human reason [...], although the knowledge process starts at the other end to Enlightenment science, which made progress through the logic of induction and patient accumulation of evidence" (Peters *et al.*, 2023, p. 832) – in a manner comparable to the transformative impact of Gutenberg's printing press (Kissinger *et al.*, 2023). This transformation stems from the use of methods that generate results "without explaining why or how their process works based on pregenerated representations of the vast oceans of data on which it was trained" (Peters *et al.*, 2023, p. 832).

Accordingly, limitations in transparency and replicability remain among the most significant challenges in the evolving relationship between science and AI. Analogously, qualitative research has also exhibited certain limitations in these areas (Jiang *et al.*, 2021). For example, in relation to transcription practices, McMullin (2023) found that 41% of the studies analysed made no mention of transcription at all (despite evidence that it had been conducted), 11% referred to the fact that transcriptions were obtained but gave no detail about the process, and 19% included only a minimal statement such as "the interviews were recorded and transcribed". Similarly, Nascimento (2019) noted that qualitative studies – in this case, within the field of management – often describe transcription practices with nothing more than a brief phrase such as "the interviews were transcribed".

Such limitations – not always attributable to a deliberate departure from positivist traditions – have prompted efforts to reinforce the rigour, reliability and validity of qualitative analysis. In this context, AI is increasingly viewed as "an option to support qualitative researchers in their work" (Jiang *et al.*, 2021, p. 94), while simultaneously presenting new challenges.

In particular, it is essential to make the workings of LLMs more transparent – to "open the black box" and clarify how their processes function. Wang *et al.* (2019), drawing on interviews with qualitative researchers, reaffirm the importance of AI transparency. Similarly, Yang *et al.* (2019) propose the concept of a "hassle-free AI", based on the idea that interaction with such systems should exhibit an appropriate level of "normality", including a clear understanding of the motivations behind the system's outputs.

A clear example of how the workings of the black box can be made explicit comes from the field of medicine. IBM Watson Health[7] is an artificial intelligence system applied to medical diagnosis. Although the AI used by Watson to analyse medical data is highly complex, physicians are able to access detailed explanations of how the system arrived at a particular conclusion or recommendation. It provides the rationale behind its diagnostic outcomes, including supporting arguments, contextual information and the identification of the most relevant data or symptoms. Analogously, in the social sciences, we should develop tools capable of transforming AI into a reliable and complementary resource – rather than a black box that remains opaque and difficult to interpret.

Advancing in this direction presents a compelling challenge: combining the use of technologies that streamline qualitative research processes with maximum rigour, human oversight and transparency, particularly in workflows involving LLMs. As noted in the introduction, Social Verbatim offers several practical applications of AI designed to address these challenges and contribute to the development of an *open science* model in qualitative research (Breznau, 2021).

The Social Verbatim tool was developed through a systematic study informed by insights gathered from interviews conducted as part of the research project "CS-Transcribe: Research on Needs and Development of a Digital Transcription Tool for the Social Sciences", which involved three profiles of potential users: researchers, transcribers and researcher–transcribers. A total of 15 individual interviews were conducted with 11 women and 4 men, including 7 researchers (4 women and 3 men), 5 researcher–transcribers (4 women and 1 man), and 3 transcribers (all women).

These interviews were based on a first demo version of the tool, which included a core set of functionalities. Informed by feedback collected during the interviews, these features were expanded and refined in the beta version of the application, which included the following components:

- An online platform for automatic transcription of video or audio files, as well as manual transcription.
- An interface for inserting annotations on non-verbal communication using icons.
- A user experience (UX) design prioritising efficiency in the review and correction process.
- A functionality for data anonymisation.
- An interface for coding.
- Automatic detection of silences, missing words and automated time stamps.
- Tools to facilitate collaborative work within research teams.
- Project management features, including detailed information for each transcription (e.g. transcriber identity, progress status).
- A foot pedal interface to support a smoother and more ergonomic experience in both manual transcription and review.
- Reporting interfaces including verbatim lists, statistics, charts and visualisations such as word and code clouds.
- Flexible import and export systems for data input and output, tailored to project needs and compatible with platforms such as ATLAS.ti and NVivo.

In relation to the *open science* paradigm, Social Verbatim offers several key contributions. Firstly, it enables any user to access the content of a transcription cited in a publication, as well as its corresponding audio source (and video, where applicable), once the material has been properly anonymised (by removing identifying references and applying voice and, where necessary, image distortion to ensure participants remain unrecognisable). Such access allows users to examine the "black box" of the transcription process and assess how the transcription was carried out, identifying any inconsistencies that may affect the research findings. Secondly, it permits user access to the broader transcription project in order to obtain general or more detailed information about the interviewees. This is contingent on the researchers' judgement that privacy can be preserved and is facilitated through a pre-anonymised system[8] designed for agile navigation.[9]

In the next phase of development, Social Verbatim aims to integrate LLMs into the coding and analysis process, following the premises outlined below, which align with the *open science* paradigm. Nonetheless, in the context of qualitative research, advancing this paradigm encounters a potential point of conflict – the essential need to protect participant privacy (Gómez *et al.*, 2025), as well as the aforementioned challenges associated with algorithmic opacity. To address these concerns, the following strategies are proposed: a) incorporation of open-source LLMs to ensure transparency in the analytical process; b) development of an interface that enables the traceability of prompts used during the analysis; c) active supervision and review by the researcher throughout the coding and analysis stages, including feedback mechanisms to refine the tool's analytical criteria; d) implementation of high standards of data privacy management, irrespective of user type (premium or general); e) in line with the recommendations of Schreder *et al.* (2025, p. 1), ensuring flexibility and interactivity, thereby overcoming

the current limitation whereby *chat-based* LLMs allow, but *do not adequately support*, intentional use for specific research tasks; and f) provision of interface functionalities that allow researchers to develop their own ideas, reinforcing – rather than distancing – their relationship with the data.

7. Conclusions

The theoretical review of the use of large language models (LLMs) in qualitative research has made it possible to identify both significant advances and persistent challenges within the field. The development of LLMs has been driven by the Transformer architecture and advancements in hardware – particularly GPUs and TPUs – which have enabled the efficient processing of large volumes of text. In this context, tools such as QualiGPT, MindCoder and Thematic-LM have been developed to support qualitative analysis by offering intuitive interfaces and advanced functionalities for coding and analysing data. These tools leverage prompt engineering to optimise inputs and generate more accurate and relevant outputs.

Nevertheless, the lack of transparency and the inherent "black box" nature of LLMs remain major concerns. It is therefore essential to improve the interpretability and transparency of these models so that researchers can understand, evaluate and trust the results they produce. Furthermore, the presence of biases in training data – which may reinforce existing social and cultural prejudices – along with concerns regarding data privacy and security, highlight the need to ensure that all data used in LLM training and operation are adequately anonymised and securely managed.

Despite these technological advances, LLMs should be viewed as complementary tools that support – but do not replace – human judgement, interpretation and analytical reasoning. Researchers must remain actively engaged in the coding and analysis processes, applying their disciplinary expertise to guide and critically assess the outputs generated by LLMs.

The integration of LLMs into tools such as Social Verbatim aims to contribute to more transparent and rigorous qualitative research by enabling greater traceability of processes and improved data management practices. Social Verbatim is thus conceived not merely as a means of automating tasks but as a collaborative platform that supports researchers in building more open, reliable and reproducible scientific practices. It facilitates access to and review of each step in the qualitative research workflow, moving towards a research ecosystem in which human–machine collaboration is not only efficient but also transparent and verifiable.

In conclusion, while LLMs offer considerable potential to enhance the depth and efficiency of qualitative analysis, their implementation must be carefully

managed to address the associated methodological, ethical and epistemological challenges. Human–machine collaboration, transparency and a commitment to open science must serve as guiding principles in the continued advancement of this field.

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Notes

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2 The application is accessible at app.socialverbatim.com

3 Social Verbatim (n.d.). Social Verbatim. https://www.socialverbatim.com (accessed 25 April 2025).

4 One of the implications of the emergence of these models is the increasing importance of "prompt engineering", which refers to the practice of designing and optimising model inputs to generate more accurate, useful or contextually relevant outputs.

5 According to OpenAI's policies, user input in ChatGPT may be used to improve its models unless this option is disabled in the settings. In contrast, data submitted via the API is not used to train OpenAI's models. This suggests that using the API offers greater data privacy and security.

6 G. Brockman [@gdb] (11 March 2023). Write your prompt like this: [1] Task: what you want ChatGPT to do [2] Context: extra info that helps set the stage [Post]. X. https://x.com/gdb/status/1634708489078706179

7 https://www.ibm.com/es-es/watson

8 Regarding voice distortion, it is evident that certain nuances of natural speech may be lost, implying a trade-off between linguistic/paralinguistic richness and privacy.

9 When providing access to data, integration with platforms such as Zenodo or similar repositories – with appropriate permissions and restrictions – could be explored. In such cases, *open science* would face a necessary limitation: the safeguarding of participant privacy.

REVIEWS
RESEÑAS

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REVIEWS/RESEÑAS

M. J. del Pino y E. Illescas (eds.). *Escuela de mujeres sociólogas de Chicago.* Sevilla: Fundación CENTRA, 2024

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El presente texto se enmarca en la línea de los que proponen visibilizar la vida y obra de las muchas mujeres que nos precedieron en todas y cada una de las áreas científicas. Son estudiosas de las que habitualmente no se hace eco la historia de las ciencias, razón por la que no suelen aparecer en los libros universitarios al uso, de ahí la trascendencia de darlas a conocer con estas investigaciones. Este libro tiene además la enriquecedora novedad de no solo mostrar sus aportaciones a la sociología y la bibliografía comentada de las distintas autoras, sino que también —como perfecto complemento— ofrece la primicia de la traducción al castellano de algunos de sus más significativos artículos. Esto lo convierte en un trabajo de referencia para quienes se acerquen a la apasionante Escuela de Mujeres Sociólogas de Chicago, un grupo de fundadoras que con fuerza y valentía forjaron los orígenes de la sociología y la intervención psicosocial entre los años 1890-1920.

La mayoría de ellas trabajaron junto a Jane Addams (1860-1935), célebre como cofundadora y *alma mater* de la Hull-House en 1889 y por ser Premio Nobel de la Paz en 1931, pero que además de socióloga fundadora fue también una muy destacada educadora y trabajadora social. En su quehacer diario buscó siempre el conocimiento a través de las perplejidades, utilizando el análisis social como potencial transformador del presente. Así mismo, acompañó a Ellen Gates Starr en su interpretación del arte y la belleza como alivio para la tristeza y frialdad de la vida industrial. Ciertamente Addams fue una mujer adelantada a su época, tanto por su vida como por su obra, que refleja a la vez un bagaje intelectual rompedor, sus estrechos vínculos con los más destacados pensadores, con la Universidad de Chicago de la que fue profesora

y sus experiencias cotidianas con las familias migrantes, muchas de ellas marginadas, con delincuentes juveniles, huérfanos, prostitutas e indigentes, extrayendo de todo ello importantes conclusiones teóricas y prácticas que expuso no solo en sus textos, sino también ante líderes políticos nacionales e internacionales y en sus numerosas intervenciones públicas, ya que fue una excelente oradora.

Junto a ella el texto aborda las contribuciones científicas de muchas reformadoras y teóricas sociales, todas ellas sociólogas, como así las consideran Deegan, Lengermann y Niebrugge, García Dauder y las propias Del Pino e Illescas, al comprobar que cofundaron la Asociación y la *Revista Americana de Sociología*, escribiendo en ella desde el primer número, desarrollando su corpus teórico y exponiendo la metodología tanto cualitativa como cuantitativa de sus investigaciones, razón que obliga a incluirlas en el canon sociológico: Julia Lathrop, Florence Kelley, Marion Talbot, Sophonisba Breckinridge, Annie Marion MacLean, Frances Kellor, Grace Abbott y Edith Abbott.

Ordenadas por su fecha de llegada a la Hull-House, de todas ellas se presenta una reseña y una contextualización de su trabajo elegido, de la propia autora y de sus aportaciones teóricas y metodológicas, referenciando sus publicaciones —más de cuatrocientas— y comentando brevemente cada una de ellas.

Los interesantes trabajos seleccionados por Del Pino e Illescas, y traducidos del inglés por Molina Durán y Patricia López para esta edición, son los siguientes: «Un sector atrasado» y «Sindicatos y deber público» (Jane Addams), «La Oficina de la Infancia» (Julia Lathrop), «El chico que trabaja» (Florence Kelley), «Sanidad y Sociología» (Marion Talbot), «Hijos de inmigrantes: problemas de adaptación» (Sophonisba Breckinridge y Edith Abbott), «El taller de trabajo subcontratado en verano» (Annie Marion MacLean), «Desempleo e inmigración» (Frances Kellor), «La Agencia para el Empleo de Chicago y la persona trabajadora inmigrante» (Grace Abbott), «Harriet Martineau y el empleo de las mujeres en 1926» (Edith Abbott).

Las guardianas de la infancia

Entre las distintas autoras abordadas en el texto —reconociendo que entre ellas hay otras figuras que fueron igualmente claves en los orígenes de la sociología en Chicago— me gustaría resaltar los trabajos de algunas de las que centraron parte de su interés en una temática frecuente entre ellas, la infancia (sobre la que versan además sus artículos seleccionados para ser traducidos): Julia C. Lathrop, preocupada por el bienestar infantil; Florence Kelley, focalizada en los menores que trabajan; Sophonisba Breckinridge, que trabajó sobre legislación, delincuencia y tribunales de menores, y Edith Abbott, que publicó sobre estas temáticas junto a la anterior.

Julia Clifford Lathrop (1858-1932) llegó a Hull-House en 1890 —diez años después de terminar sus estudios en el Vassar College— y permaneció allí hasta 1912, año en el que pasó a ser jefa de la Oficina de la Infancia. Como feminista, apeló a la responsabilidad pública en la solución de problemas sociales, centrándose en la salud mental de las mujeres y en la protección de la maternidad y la infancia.

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En su artículo de 1912, publicado en la *American Journal of Sociology*, «The Children´s Bureau», analiza el establecimiento y funciones de dicha oficina, en pro de la defensa y la promoción del bienestar infantil en todo el país.

En 1917 publicó «Shall this Country Economize for or against Its Children?», en *The Journal of Education*, planteando que el país no debería economizar a costa del bienestar de la infancia. Ese mismo año, en *The North American Review*, apareció su trabajo «The Children Bureau in War Time», centrado en los retos y actividades de la oficina en tiempos de guerra. «Income and infant mortality» se publicó en 1919 en el *American Journal of Public Health*, insistiendo en cómo la economía y los ingresos familiares afectan directamente a la salud y al bienestar de la infancia.

En «Standars of Children Welfare» *(The Annals of the American Academy of Political and Social Science*, 1921) establece los patrones del bienestar infantil, delimitando sus prácticas básicas. En 1925 publica en el mismo medio «Federal Safeguards of Child Welfare», «Child Welfare Has Become a World Concern —What is the Share of the United States?», analizando medidas federales de salvaguarda del bienestar de los/as menores y subrayando el papel del gobierno en la promoción de estas políticas.

En 1926, insistiendo en el tema del bienestar infantil, plantea desafíos y soluciones a nivel internacional en su artículo «International Child Welfare Problems», publicado en *Proceedings of the Academy of Political Science in the City of New York.*

Florence Kelley (1859-1932) fue conocida precisamente con el sobrenombre de «guardiana de la infancia», apelativo que hemos escogido para dar título a este epígrafe. Víctima de violencia de género, consiguió el divorcio y la custodia de sus tres hijos en el estado de Illinois, trasladándose junto a ellos y su madre a Hull-House en 1891. Allí residirán hasta 1899, realizando ella investigaciones sobre condiciones de vida y laborales en los barrios adyacentes, como asociada a la Universidad de Chicago.

Mary Jo Deegan afirma que a ella se deben muchos de los importantes cambios en la legislatura actual sobre mujeres e infancia.

Coincidió con Julia Lathrop en la Comisión Nacional para el Trabajo Infantil (NCLC) y con Sophonisba Breckinridge y Edith Abbott en la Asociación Nacional Americana para el Sufragio Femenino (NAWSA).

En su artículo «The working Boy» (*American Journal of Sociology,* 1896) analiza las condiciones sociolaborales del trabajo infantil y la repercusión sobre su bienestar. En 1898, en la misma revista, aparece su trabajo «The Illinois Child-Labor Law», centrado en la Ley sobre Trabajo Infantil de Illinois, su contexto, contenido e impacto sobre los derechos de la infancia, publicando en 1902 uno más amplio al respecto en *The Annals of the American Academy of Political and Social Science*, «Child Labor Legislation» y, en esta misma revista en 1903, otro titulado «An Effective Child-Labor Law: A Program for the Current Decade», en el que plantea un programa integral para desarrollar leyes efectivas sobre trabajo infantil para la primera década del nuevo siglo.

En 1904 publica en el *American Journal of Sociology* un análisis sobre el movimiento progresista y la estupenda legislación de protección infantil en Illinois a principios de

siglo, «Has Illinois the Best Law in the Country for the Protection of Children?», pese a lo cual recomienda evaluar y actualizar continuamente estas leyes, reflejando las transformaciones sociales y los desafíos de la industrialización.

A partir del año siguiente publicará múltiples artículos sobre el trabajo infantil en *The Annals of the American Academy of Political and Social Science,* inicialmente —en «Child Labor Legislation and Enforcement in New England and the Middle States» (1905)— examinando la legislación y la aplicación de la ley laboral infantil y pidiendo en consecuencia la prohibición del trabajo a menores de 16 años y la limitación de su jornada laboral a 8 horas diarias. En 1906, en su trabajo «The Federal Government and the Working Children», analiza el papel del Gobierno Federal en la mejora de las condiciones laborales infantiles buscando su protección; en 1907, en «Obstacles to the Enforcement of Child Labor Legislation», identifica los obstáculos y desafíos en la aplicación de la legislación sobre trabajo infantil, proponiendo soluciones que garanticen su cumplimiento y, en ese mismo año, en «Reports from States and Local Child Labor Committees and Consumers´ *Leagues*», ofrece un compendio de informes sobre trabajo infantil de comités locales y estatales y de ligas de consumidores, mostrando un detallado panorama de las condiciones laborales y los diversos intentos de reforma; en 1908 en «The Responsibility of the Consumer», plantea un tema que sigue de total actualidad, la compra ética y la responsabilidad del consumidor/a sobre el trabajo infantil; en 1909, en «Scholarships for Working Children», publica otro tema siempre actual, la importancia de la educación para mejorar las condiciones de vida de menores que trabajan, proponiendo becas que les liberen de esta carga; y también en 1909 «The Federal Children`s Bureau, a Symposium», recogiendo las aportaciones de un encuentro colectivo sobre el trabajo y la función de la Oficina General de la Infancia, en donde explora su impacto en la política social y el bienestar infantil; en 1911, en «What Should We Sacrifice to Uniformity», nos cuenta los esfuerzos de la Federación General de Clubes de Mujeres y de la Liga Nacional de Consumidores para intentar combatir el trabajo infantil; en 1914, en «Women and Social Legislation in the United States», examina el papel de las mujeres como promotoras de la legislación social del país respecto a temas relacionados con el salario mínimo, la protección de las mujeres, el trabajo infantil, etc.; en 1922, en «Industrial Condition as a Community Problem with Particular Reference to Child Labor», plantea que las relaciones industriales son un problema socio comunitario, centrándose en el trabajo infantil.

En 1912, en *Proceedings of the Academy of Political Science in the City of New York*, había publicado «Labor of Women and Children in Tenements», solicitando la creación de una Comisión que abogase por un salario mínimo que proteja a las mujeres, niñas y niños que trabajan desde sus casas para las industrias. Y en 1915 «Children in the Cities en la National Municipal Review», en el que aborda la vida de la infancia en las ciudades, los desafíos y las oportunidades para su desarrollo.

Finalmente, en 1931, su artículo titulado «Why the Children´s Bill Did Not Pass», publicado en la *American Lab. Legislation Review*, versa sobre los obstáculos políticos y sociales que llevaron al fracaso la aprobación de la Ley de Protección de la Infancia.

Sophonisba Breckinridge (1866-1948), doctora en Ciencias Políticas y Economía (1894) y en Derecho (1904) en Chicago, vivió en Hull-House entre 1908 y 1920.

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Redactó informes para la Oficina de la Infancia y en 1909 publicó, en *The Elementary School Teacher*, «Child: Labor Legislation», en el que analizaba la legislación sobre trabajo infantil y los esfuerzos por devolver la infancia a la escuela.

En 1912 publicó, junto a Edith Abbott, el libro *The Delinquent Child and the Home*, en el que examinaba los desafíos de adaptación que han de afrontar los hijos/as de inmigrantes en Chicago a principios del siglo XX. Tras analizar los porcentajes de menores delincuentes procedentes de distintos países, encuentran el frecuente racismo sufrido y las dificultades de identidad y de lenguaje —ante la confrontación de la cultura de origen con la norteamericana— ocasionan grandes problemas de adaptación y altas tasas de indisciplina infantil, dejando especialmente impotentes a los progenitores de descendientes nacidos ya en América. En *Truancy and Non-Attendance in the Chicago Schools: a study of the social aspects of the compulsory education and child labor legislation of Illinois*, publicado también con Edith Abbott en 1917, estudian a fondo los problemas de los menores, el absentismo escolar y su relación con la delincuencia juvenil.

The Child in the City (1912) fue su introducción a un libro resumen de las distintas conferencias pronunciadas durante la Chicago Child Welfare Exhibit de 1911.

En 1930 publicó *Re-examination of the Work Children`s Court*, destacando los desafíos, mejoras y logros de los tribunales de menores. Y en 1932, *Children and the Depression*, examinando cómo afectó a los menores la Gran Depresión, tema que vuelve a abordar en una de sus últimas publicaciones de 1940, *Government`s Role in Child Welfare*.

Edith Abbott (1876-1957) tuvo la suerte de ser muy reconocida por sus múltiples actividades, pero aquí la traigo solo como coautora —junto a Sophonisba Breckinridge— de trabajos sobre la infancia.

Sobre su biografía, comento brevemente que se graduó en 1901 en Nebraska y defendió su doctorado en Economía Política en Chicago (1905), permaneciendo en dicha Universidad como docente entre 1913-1920. Vivió en Hull-House entre 1908-1920; realizó informes para la Oficina de la Infancia y hemos ya referenciado la publicación de dos libros en coautoría, el primero (1912) sobre la delincuencia juvenil y el segundo (1917) sobre el absentismo escolar y cómo proteger a la infancia del trabajo infantil. Igualmente, realizó reseñas de distintas publicaciones sobre estos temas.

Materias igualmente relevantes quedan para quien se interese por la incorporación de las mujeres a la Universidad, contadas por una de sus primeras decanas, Marion Talbot; o el trabajo que —como socióloga jurista— desarrolló Grace Abbott para mejorar las condiciones de vida de la infancia; o la combinación de metodologías cualitativas y cuantitativas que utiliza Annie Marion MacLean para estudiar las condiciones laborales de las mujeres y de la población migrante canadiense, etc., con ello sin duda descubrirán una sociología que, en su pragmatismo, contribuyó a hacer del mundo un lugar mejor para todos nosotros/as.

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REVIEWS/RESEÑAS

F. F. Muñoz y P. Paniagua. *La gran evasión. Economía para las ciencias sociales y humanas.* Madrid: Editorial Síntesis, 2024

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En un momento crucial para la educación superior europea, caracterizado por la búsqueda de modelos educativos más flexibles e interdisciplinarios, el libro *La gran evasión. Economía para las ciencias sociales y humanas*, de Félix Fernando Muñoz y Pablo Paniagua (Editorial Síntesis, 2024), se presenta como una contribución particularmente oportuna y valiosa. Su título evoca deliberadamente la obra del premio nobel Angus Deaton *The Great Escape* (2014), estableciendo desde el inicio su intención de explicar cómo la humanidad logró escapar de la trampa maltusiana hacia un régimen de crecimiento sostenido. Sin embargo, mientras Deaton se enfoca principalmente en los aspectos relacionados con salud, longevidad y bienestar, Muñoz y Paniagua amplían la perspectiva para incluir otros factores determinantes en el desarrollo económico como el papel de las instituciones o las políticas públicas. Esta aproximación más holística refleja esa tendencia hacia la interdisciplinariedad en las ciencias sociales. El libro, con una extensión de 327 páginas, está cuidadosamente diseñado como manual universitario alternativo. Como señalan los autores, no pretende sustituir a los clásicos manuales de economía —que, por otra parte, priorizan modelos matemáticos y la formalización—, sino ofrecer un texto comprensible para que otras disciplinas de las humanidades o de otras ciencias sociales se puedan acercar a la economía. La amplia experiencia como docentes de los autores se refleja en la claridad del lenguaje, en la abundancia de ejemplos narrativos, en la inclusión de gráficos y cuadros que ilustran los conceptos, pero también en la modularidad de los capítulos, que pueden leerse de forma independiente. Este planteamiento es uno de los puntos fuertes, ya que facilita la comprensión de conceptos y es un complemento ideal a aquellas disciplinas, materias, asignaturas, cursos, donde la economía no es el centro, pero sí un componente relevante.

La primera parte del libro («La gran evasión: de la subsistencia al intercambio») introduce al lector en la lógica de las trampas maltusianas, mostrando cómo durante siglos la humanidad permaneció atrapada en un equilibrio de bajos salarios, alta mortalidad y escaso progreso. Aquí los autores recurren a la historia económica y muestran la relación entre salarios reales y crecimiento poblacional. El contraste con la Revolución industrial, presentada como el momento de ruptura que da origen a la «gran evasión», permite al lector entender la magnitud del cambio. Los economistas clásicos, como Adam Smith o David Ricardo, ayudan a comprender los detonantes de la industrialización, un proceso que más que disruptivo fue paulatino y que estuvo estrechamente ligado al comercio y a la creciente división internacional de los factores de producción. El ensayo de Leonard E. Read *Yo, el lápiz* (1958) se utiliza en el libro como ejemplo paradigmático para explicar la división del trabajo a escala global. A partir de un objeto cotidiano aparentemente simple, se muestra la enorme complejidad que conlleva su fabricación, imposible de poder llevarse a cabo por una sola persona, ya que en la producción intervienen maderas procedentes de Oregón, grafito de Sri Lanka, caucho de Brasil y Vietnam, aluminio procedente de Argentina y procesado en China, además de lacas, ceras y otros insumos que requieren múltiples procesos industriales dispersos en diferentes países. La paradoja, como enfatizan los autores, es que, pese a esta enorme complejidad, los lápices están disponibles en nuestro estuche gracias al poder coordinador del mercado y del sistema de precios. Este tipo de ejemplos no solo facilitan la comprensión, sino que también despiertan el interés en el lector e invitan a reflexionar sobre nuestro día a día.

La primera globalización con la multiplicación de los intercambios y el posterior incremento del crecimiento económico no pueden entenderse sin el papel central de la innovación. En este marco, el capítulo 5 del libro introduce la noción schumpeteriana de la «destrucción creativa»: el capitalismo progresa a través de un proceso continuo en el que la innovación no solo genera valor, sino que simultáneamente destruye estructuras previas. Los autores desarrollan esta idea mediante ejemplos muy ilustrativos que facilitan la comprensión del concepto de destrucción creativa y de los dilemas a los que deben enfrentarse los empresarios. Por ejemplo, la aparición del automóvil, por un lado, impulsó la industria automotriz y generó importantes efectos de arrastre intersectoriales —desde la producción de neumáticos hasta la construcción de autopistas, gasolineras o cadenas de comida rápida—; y, por otro, supuso la desaparición de industrias tradicionales como la de carruajes o la cría de caballos, liberando recursos que se reasignaron hacia nuevas actividades. Ya en el siglo XXI, otro ejemplo es el de Blockbuster, empresa que en 2004-2005 contaba con unas 9.000 tiendas y 84.000 empleados en todo el mundo, pero la irrupción del *streaming* (Netflix, Hulu) y los algoritmos de recomendación destruyó su modelo de negocio en pocos años. Así, el capitalismo debe entenderse menos como un proceso de mera acumulación de capital y más como una secuencia de innovaciones en la que toda empresa dominante está permanentemente amenazada por la próxima disrupción o paradigma tecnológico.

La segunda parte del libro está dedicada a los fundamentos de la ciencia económica moderna, tanto en su vertiente micro como macroeconómica, y constituye el núcleo de la obra. Muñoz y Paniagua introducen de forma gradual los conceptos esenciales,

comenzando por el valor subjetivo, la utilidad marginal o el coste de oportunidad, todos ellos ilustrados con ejemplos sencillos y cercanos a la experiencia cotidiana. De esta manera, el lector no se enfrenta a definiciones abstractas, sino a situaciones reconocibles que le permiten entender el funcionamiento de la lógica económica. Así, la elasticidad de la demanda se explica a través de comparaciones entre bienes de primera necesidad y bienes de lujo, o entre productos con sustitutos próximos y aquellos sin alternativas, lo que ayuda a comprender por qué las variaciones en el precio afectan de forma diferente a unos y a otros. De igual modo, el equilibrio entre oferta y demanda se presenta mediante narrativas que describen interacciones concretas entre compradores y vendedores, reforzadas con gráficos simples que clarifican los movimientos de precios y cantidades.

El libro dedica también una atención significativa al contraste entre el monopolio y la competencia perfecta, dos modelos extremos que permiten entender las formas intermedias de organización de los mercados. En el terreno de la macroeconomía, la estrategia didáctica es similar: en lugar de recurrir a formalizaciones algebraicas complejas, los autores prefieren presentar los grandes conceptos —PIB, inflación o ciclos económicos— a partir de ejemplos y explicaciones narrativas. Así, el lector comprende cómo se mide la producción de un país, cómo la inflación erosiona el poder adquisitivo o cómo las fluctuaciones cíclicas afectan al empleo y a la inversión. Lo que en otros manuales suele percibirse como abstracción técnica se transforma aquí en dinámicas comprensibles y ligadas a la experiencia cotidiana. Es cierto que este enfoque puede resultar insuficiente para quienes buscan un nivel de análisis avanzado, pero no es esa la vocación del libro. El propósito central es que los lectores logren hacerse con un vocabulario conceptual básico que les permita interpretar los debates públicos, comprender los dilemas de política económica y participar con criterio en discusiones sociales que, en última instancia, afectan a su vida diaria.

La tercera parte del libro («Economía política y capitalismo») ofrece un marco para reflexionar sobre el capitalismo y sus desafíos contemporáneos. Los autores inciden en la teoría de las instituciones, los planteamientos de la elección pública y las discusiones sobre externalidades para situar a la economía en su dimensión social y política. El énfasis está en mostrar cómo los problemas económicos no son solo cuestiones técnicas, sino que implican decisiones colectivas, están determinadas por incentivos y enmarcadas en estructuras de poder e instituciones. Por ejemplo, apoyándose en la célebre obra de Daron Acemoglu y James A. Robinson (*Why Nations Fail*, 2012), los autores muestran cómo las instituciones inclusivas, ejemplificadas en casos como Corea del Sur o Estados Unidos, promueven la innovación y la participación en actividades económicas, mientras que las instituciones extractivas, presentes en países como Zimbabue, Cuba, Venezuela, Argentina o Corea del Norte, tienden a concentrar los beneficios en élites reducidas y a obstaculizar el desarrollo. El análisis de las externalidades negativas se ilustra con ejemplos ambientales fácilmente reconocibles como la contaminación o la sobreexplotación de recursos. Del mismo modo, los debates sobre desigualdad muestran la evolución reciente (índice de Gini desde 1980) de la distribución del ingreso en distintos países, lo que facilita conectar el concepto con realidades actuales. En este sentido, el libro recoge el interesante y mediático

debate en torno a Thomas Piketty y la hipótesis del «patrón en U» de la desigualdad. Se recogen las críticas de otros autores que destacan que no fueron los impuestos progresivos ni las guerras mundiales los que redujeron la desigualdad en Occidente, sino la expansión de la vivienda en propiedad y los fondos privados de pensiones y ahorro. A ello se suma la evidencia de Xavier Sala-i-Martin, entre otros que señalan una tendencia reciente a la reducción de la desigualdad global y, en muchos países, también de la interna. Estas estimaciones sugieren que el mundo, además de volverse más rico, está alcanzando mayores niveles de equidad, matizando la visión catastrofista de Piketty.

Una de las principales virtudes del libro es la insistencia en el carácter interdisciplinar de la economía, recuperando la tradición de la economía clásica. Para un estudiante de humanidades o de otras ciencias sociales, esto supone una invitación a reconocer la economía como una disciplina necesaria en su formación, una invitación a descubrir que la economía no es un territorio ajeno e inexorable. Para un lector no lego en la materia, supone la posibilidad de entender mejor la relación entre la teoría económica, la historia o la filosofía política. En este sentido, *La gran evasión* no es solo un manual de economía, sino un instrumento para la reflexión crítica sobre la sociedad contemporánea. El estilo del libro se caracteriza por lo tanto en la claridad expositiva y la ausencia de tecnicismos innecesarios. Esto es coherente con su orientación y con su propósito de llegar a lectores que, en muchos casos, se acercan a la economía con cierta aprehensión. La economía es presentada como un conjunto de problemas humanos fundamentales que pueden comprenderse con ejemplos claros y razonamientos lógicos.

Comparado con los manuales tradicionales, *La gran evasión* es una excelente alternativa. Mientras que los populares textos de Blanchard, Mankiw o Krugman cumplen una función imprescindible al introducir a los estudiantes de economía en la lógica de los modelos, lo hacen a costa de una fuerte formalización que puede resultar excluyente para quienes no tienen formación matemática o un interés especial en los modelos concretos, sino que aspira a entender el contenido y el sentido de la economía como disciplina científica. En cambio, el libro de Muñoz y Paniagua permite acercarse a la economía sin temor. Para quienes luego deseen profundizar, siempre quedará la posibilidad de transitar hacia manuales más técnicos. En este sentido, la obra es un excelente puente entre el desconocimiento de la economía y la comprensión fundamental y sistemática, abriendo la puerta a espíritus más curiosos a otros textos más técnicos.

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REVIEWS/RESEÑAS

M. E. Gutiérrez Jiménez. *Cuando el republicanismo se encuentra con la caricatura.* El Tío Clarín *(Sevilla, 1864-1871), un modelo de prensa popular divergente a mediados del siglo XIX.* Sevilla: Fundación CENTRA, 2024

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La caricatura política decimonónica ha ido adquiriendo mayor protagonismo en el ámbito académico español durante los últimos años, sobre todo —aunque no solo— dentro de la investigación histórica. Las valiosas huellas contenidas en la prensa satírica ilustrada han sido descubiertas o redescubiertas por las y los historiadores de los últimos lustros como fuente con la que analizar desde un ángulo distinto, o con la que comprender mejor, los procesos políticos, sociales o culturales de aquella centuria. Sin renunciar a su valor heurístico para explicar procesos históricos, el libro del que nos vamos a ocupar a continuación, sin embargo, como señala su autora desde la Introducción, pone el acento en el papel que la inclusión de este tipo de imágenes pudo haber tenido en la transformación de los modelos periodísticos, en concreto, en su posible función como catalizadoras de la transición desde una prensa destinada a un número reducido de consumidores —los letrados de la primera mitad del siglo XIX— hacia una prensa de masas, que fue la que se generalizó a partir del arranque del siglo XX.

El humor gráfico, por tanto, como sostiene Gutiérrez Jiménez en su investigación, habría desempeñado un papel relevante como artefacto cultural que habría permitido la incorporación al debate público de segmentos de la sociedad hasta entonces excluidos; algo que se habría logrado gracias a las particularidades del lenguaje visual en general y del de la caricatura política en particular; un lenguaje capaz de interpelar a aquellos segmentos de la población hasta entonces marginados dentro del paradigma liberal decimonónico hegemónico. Así, de manera análoga a lo que en los años en los que se centra esta investigación —el final de la era isabelina y el inicio del Sexenio democrático— estaba ocurriendo con la prensa femenina, que, en ese caso, a través de la literatura y de los temas de moda y sociedad, brindó a otro segmento de la sociedad —el de las mujeres— la posibilidad de participar en el debate público, aun-

que fuera inicialmente desde los márgenes, la prensa política con caricaturas podría haber cumplido, según esta autora, una función similar dentro de las amplias bolsas de población iletrada que entonces existían en el país.

Para demostrar su argumento, Gutiérrez Jiménez utiliza como fuente el periódico ilustrado sevillano *El Tío Clarín* (1864-1871), sobre el que realiza un concienzudo análisis tanto desde el punto de vista de la historia crítica del periodismo como también desde el historiográfico y el estético. La elección de esta fuente, tanto por el periodo como por el lugar donde se publica, le permite plantear varias problemáticas encaminadas a demostrar su hipótesis. Una de ellas está relacionada con el desarrollo del republicanismo en España precisamente en los años que son objeto de estudio en este libro. Las culturas políticas republicanas habían quedado lógicamente fuera de los márgenes de la política oficial durante el reinado de Isabel II; sin embargo, durante los años finales de este, habían ganado gran número de adeptos de resultas de la pésima gestión de la monarquía. Aunque el republicanismo de entonces amalgamaba un heterogéneo grupo de intereses, todos ellos tenían como denominador común —más allá de su intrínseco antimonarquismo— la convicción de que era necesario, por una parte, ampliar la base social de la política, y, por otra, reconstruir el tejido social destruido después de décadas de mal gobierno; una reconstrucción que debía apoyarse en valores tan relevantes dentro de la reformulación moderna del republicanismo como la moralidad, la virtud y la participación ciudadana.

Es en este punto donde, como evidencia el acertado título que Gutiérrez Jiménez le ha dado a su monografía, el republicanismo se habría encontrado con la caricatura política, pues esta permitiría a los afectos con esta ideología política, al mismo tiempo que denunciar los abusos de la monarquía, educar a la ciudadanía para hacer de ella ese sujeto virtuoso que participaría de forma solícita y desinteresada en la gestión de los asuntos públicos. Así, las viñetas de actualidad publicadas en *El Tío Clarín* durante 1864 —que son analizadas sobre todo en el quinto capítulo de esta monografía— mostraban, por una parte, la inmoralidad de la monarquía y de la clase política ligada a ella, cuyo único objetivo parecía ser satisfacer sus intereses particulares; mientras que, por otra parte, el pueblo trabajador, al que se interpelaba mediante distintos arquetipos con los que los lectores/observadores podían sentirse identificados —tanto por la indumentaria como por los escenarios o la forma en que se expresaban los personajes que transitaban por esas viñetas—, era presentado como el elemento sano de la sociedad, el único capaz de redimir a una nación que llevaba décadas siendo maltratada.

Otro aspecto interesante que le permite a Gutiérrez Jiménez el análisis de este periódico satírico ilustrado es profundizar sobre la trayectoria ideológica, empresarial y artística de su creador, Luis Mariani Jiménez. El relato de su vida, así como el de los diferentes proyectos editoriales en los que participó, ofrece tanto una visión panorámica de la prensa política —ya fuera o no ilustrada— de los años en que permaneció en activo este agente cultural como algunas pistas más para relacionar el humor gráfico con el republicanismo. Respecto a esto último, resulta muy ilustrativa la reconstrucción que proporciona la autora sobre las redes que tejió Mariani con colegas suyos tanto españoles como europeos, sobre todo franceses. La creación de estas redes favoreció

la circulación no solo de modelos estéticos o de técnicas de dibujo e impresión, sino también de ideas y principios, cuya formulación se realizaba tanto a través de palabras como de imágenes. Dentro de las redes españolas de Mariani, quisiera llamar la atención —como también lo hace la autora— sobre las que estableció con algunos colegas cubanos. La isla de Cuba, entonces todavía parte del Imperio español, fue la cuna de insignes republicanos, como Ramón María de Labra, además de que, al estar situada en América, tenía potencialmente un valor simbólico adicional, pues este continente se había convertido para buena parte del republicanismo español de estos años en tierra de progreso y libertad, frente a una vieja Europa que no lograba deshacerse de ciertas rémoras del pasado, entre ellas, la monarquía. De modo que la red transatlántica urdida por Mariani resulta asimismo interesante, en tanto que se integra dentro de esa red más amplia en la que participaron numerosos letrados de una y otra orilla del Atlántico.

Una tercera cuestión sobre la que reflexiona Gutiérrez Jiménez en su análisis de *El Tío Clarín* es sobre la relación entre lo local y lo global. El neologismo «glocal» aparece en esta monografía desde las primeras páginas y su significado —a saber, la adaptación de productos o ideas globales a escala local, o viceversa— le permite mostrar cómo esta cabecera de la prensa satírica ilustrada, a pesar de nutrir su agenda informativa con asuntos locales —una agenda informativa de la que también formaron parte las viñetas de actualidad analizadas—, abordaba temas de interés global, que quedarían sintetizados en principios y valores como la virtud, la moralidad o la participación ciudadana, que, como mencionábamos anteriormente, tenían especial significación dentro del pensamiento republicano. Con esta lectura en clave «glocal», la autora demuestra que los espacios generalmente considerados como periféricos tanto desde el punto de vista geográfico como del de la producción de ideas, no solo participaron de estas, sino que contribuyeron a su densificación a partir de las reformulaciones que propusieron, realizadas a la luz de su propia realidad.

Además de los tres aspectos señalados hasta aquí, *El Tío Clarín* da pie a Gutiérrez Jiménez para reflexionar sobre otros temas, que de una forma u otra involucran a la cabecera y que le permiten apuntalar su hipótesis de trabajo. Entre ellos, cabría destacar, por una parte, las transformaciones que experimentaron las culturas visuales durante las décadas centrales del siglo XIX, que, gracias a los avances científicos y a las tecnologías de reproducción de imágenes, lograron ampliar los referentes icónicos de las sociedades, aspecto que indudablemente debió afectar a las formas en que los espectadores de las viñetas políticas se acercaron a ellas. Por otra parte, e íntimamente ligado con lo anterior, el análisis propiamente de las viñetas de actualidad de *El Tío Clarín* permite a la autora reflexionar sobre las características y las posibilidades expresivas de los recursos visuales empleados de manera habitual en el humor gráfico, para lo cual se apoya, entre otras, en aportaciones realizadas desde la semiótica por especialistas como Gonzalo Abril o Cristina Peñamarín, con las que identifica y explica el funcionamiento de algunos tropos, de forma significativa la ironía, que constituye el elemento retórico por excelencia de este género verbovisual. Asimismo, el análisis de esta cabecera también sugiere a Gutiérrez Jiménez una reflexión de carácter historiográfico, pues le permite llamar la atención sobre las cualidades intrínsecas de la caricatura como lugar de intersección entre la historia

cultural y social, esto debido a la potencialidad de este artefacto cultural para provocar o promover acciones o movimientos dentro de ciertos segmentos de la sociedad, en el caso concreto estudiado, dentro de los simpatizantes con el republicanismo.

Respecto a este último aspecto, es decir, la respuesta provocada por las imágenes en los potenciales consumidores de estas, es donde quizás la monografía de Gutiérrez Jiménez resulta algo menos convincente. Como señalaba David Freedberg en su libro *El poder de las imágenes. Estudios sobre la historia y la teoría de la respuesta* (Madrid, Cátedra, 1992), apuntar con cierto grado de certidumbre dicha respuesta obliga al historiador a abandonar el lugar de la conjetura y a buscar fuentes que permitan atestiguar que, efectivamente, esta se produjo, como ocurre, por ejemplo, con las imágenes religiosas altamente simbólicas, cuyas respuestas resultan fáciles de constatar a través de distintos tipos de fuentes. En el libro de que es objeto esta reseña, la relación entre las viñetas de actualidad publicadas en *El Tío Clarín* y el auge que experimentó el republicanismo en España en esos años no aparece documentalmente probada de forma contundente. Sin duda, se puede conjeturar que esas viñetas contribuyeron a propagar las ideas de que era portador este periódico entre aquellos segmentos de la población que las leyeron, ya fuera de forma directa o indirecta; sin embargo, resulta difícil ponderar el grado de influencia que tuvieron o el papel que desempeñaron dentro de los demás mecanismos que desplegaron los afectos al republicanismo en sus campañas proselitistas.

Este cuestionamiento sobre la respuesta a las imágenes (inevitable entre todas y todos los que trabajamos con esta fuente), desde luego, no invalida las aportaciones de esta monografía ni la demostración de la hipótesis principal que la articula, pues resulta claro que *El Tío Clarín*, tanto por su contenido verbal como sobre todo por el visual —por sus *texturas*, que es como la autora denomina cada página ilustrada de esta publicación—, representó un modelo de prensa transgresor tanto en la forma como en el fondo respecto al modelo hegemónico previo. Esta fórmula periodística, como apunta Gutiérrez Jiménez, debió de servir de gozne o bisagra entre el viejo y el nuevo periodismo, pues la voluntad de Mariani, su editor responsable y autor de buen parte de los contenidos, no fue la de servir de medio de comunicación únicamente para una élite letrada, sino que buscó interpelar al ciudadano común y corriente, aquel que podía verse reflejado en los personajes de las viñetas que formaron parte de todas las ediciones de este periódico; incluso en la propia máscara narrativa creada por Mariani, el tío Clarín, que con su traje goyesco y con su clarín y su garrote estaba dispuesto a azotar a todos aquellos y a todo aquello, que, en su opinión, debía ser objeto de crítica y de ridiculización.

Este libro, por tanto, que cuenta además con una muy cuidada edición, sobre todo en lo referente a la reproducción de imágenes —tanto de la cabecera analizada como de otras contemporáneas—, constituye una significativa aportación no solo para la historia del periodismo y la comunicación social, que es donde la autora pretende incidir de forma más directa, sino también para la historia política, social o cultural decimonónica a escala «glocal», pues las viñetas de actualidad de *El Tío Clarín* abordaron tópicos de todos estos temas, con los que, igual que los republicanos de otras latitudes, pretendió influir en la ciudadanía y hacerla partícipe de un proyecto político en donde estaba llamada a ocupar un lugar protagónico.

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REVIEWS/RESEÑAS

Ó. Luengo y J. García-Marín (coords.). *Polarización política y medios de comunicación en campañas electorales. Una visión desde Andalucía.* Granada: Comares, 2025

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La política contemporánea se desarrolla en un escenario especialmente complejo, donde la información circula a una velocidad sin precedentes y la opinión pública es moldeada de constantemente por los medios de comunicación. La obra *Polarización política y medios de comunicación en campañas electorales*, coordinada por Óscar Luengo y Javier García-Marín, parte de una constatación ampliamente compartida: vivimos en un tiempo marcado por la inestabilidad política, el auge de los populismos y una creciente polarización en las sociedades democráticas.

Lo novedoso de este volumen no reside únicamente en su objeto de estudio, la polarización política y su relación con los medios de comunicación, sino en la aproximación metodológica empleada. La construcción de una base de datos propia (que incluye cinco medios de televisión, cinco emisoras de radio y prensa escrita) permitió realizar un análisis comparado prácticamente inédito en el panorama académico español. La recogida y transcripción de los datos se realizó mediante procesos automatizados de reconocimiento de voz (*speech recognition*). De este modo, aplicaron técnicas de *Natural Language Processing* (NLP) combinando minería de texto, modelos computacionales y métricas propias como la distancia afectiva o la toxicidad. Este enfoque permite responder preguntas fundamentales acerca del papel de los medios en la polarización política: desde su influencia en momentos clave de las campañas electorales recientes hasta el efecto de su titularidad (pública o privada), el componente ideológico de la cobertura mediática o el impacto de elementos como la distancia afectiva, la toxicidad y el sentimiento en el discurso.

El análisis se centra específicamente en los seis procesos electorales celebrados en España en 2023 y 2024 (generales, autonómicas y europeas), abordando la polarización desde múltiples perspectivas. La obra se sustenta en la labor de un grupo de investigación consolidado (Political Communication Research Group) y en distintos proyectos financiados (entre ellos POLAR-MED, por el Centro de Estudios Andaluces, CENTRA), lo que refuerza su solidez y rigor académico.

La estructura del libro comprende nueve capítulos, organizados en tres bloques temáticos. Comienza con una introducción general en el capítulo inicial elaborada por los coordinadores del volumen. El primer bloque (capítulos 2 y 3) contextualiza el papel de los medios de comunicación en España y Andalucía y, por ende, el comportamiento electoral de los ciudadanos. El segundo bloque, compuesto por los siguientes cuatro capítulos (4, 5, 6 y 7), examina de manera específica la cobertura mediática de los distintos procesos electorales en la televisión, prensa escrita, radio y redes sociales. Cada uno de ellos combina un análisis descriptivo utilizando diferentes herramientas metodológicas para analizar dimensiones como la ideología, la línea editorial o la presencia de toxicidad en el discurso. Por último, el tercer bloque (capítulos 8 y 9) aborda los desafíos para la democracia desde dos ámbitos: el populismo y la influencia de los debates electorales.

El capítulo introductorio, elaborado por los coordinadores del volumen, Luengo y García, sitúa al lector en el contexto general de la investigación. Lejos de concebir la polarización como un mero enfrentamiento ideológico, los autores la presentan como un proceso complejo y multidimensional, en el que convergen factores políticos, mediáticos, tecnológicos y sociales. Tomando como referencias fenómenos internacionales recientes, como el ascenso de Donald Trump en Estados Unidos o el auge de movimientos populistas de extrema derecha en Europa y América Latina, se establecen conexiones con la realidad española y, de manera particular, con el escenario andaluz. En este marco, se subraya como la irrupción de nuevas opciones políticas ha contribuido a un panorama más fragmentado y convulso donde la competencia electoral se desplaza a los extremos.

De manera especial, los autores destacan el papel de las transformaciones tecnológicas de las últimas décadas (internet, redes sociales, algoritmos de recomendación y digitalización masiva de datos) en la configuración de la comunicación política. Estos cambios no solo alimentan la fragmentación y la posibilidad de manipulación, sino que también plantean la amenaza de la desinformación como uno de los grandes riesgos de las democracias actuales.

En este sentido, el libro invita a reflexionar sobre el papel de la ciencia política: el análisis de datos resulta indispensable, pero no debe hacerse como un fin en sí mismo, sino como un medio para responder preguntas relevantes acerca del funcionamiento de nuestras democracias. Bajo esta perspectiva, la polarización mediática, centro del análisis, se entiende también como un efecto de las dinámicas políticas y sociales y se examina con un enfoque interdisciplinar y metodológicamente innovador aplicado a los procesos electorales recientes en España.

Lucena e Illescas, en el capítulo 2, analizan la comunicación en España y Andalucía, situando el sistema mediático español dentro del modelo de pluralismo polarizado de Hallin y Mancini (2004), caracterizado por el paralelismo político y la intervención estatal. Los autores destacan como la digitalización, la aparición de las redes sociales y la crisis de confianza ciudadana a los mismos ha transformado el ecosistema mediático, especialmente en un contexto político muy convulso marcado por la moción de censura a Rajoy, numerosas citas electorales, la pandemia del COVID-19 y un confinamiento.

Esta transición digital ha fragmentado las audiencias y debilitado el modelo tradicional basado en la prensa, radio y televisión: la prensa pierde lectores en favor de sus versiones *online*, la televisión se transforma con las OTT y el *streaming*, mientras que los pódcast y los nuevos medios digitales ganan relevancia. Este nuevo ecosistema, sin embargo, se desarrolla bajo una fuerte concentración empresarial, que reduce el pluralismo y refuerza la dependencia política y económica de los medios. A su vez, el aumento de la desinformación y el *clickbait*, agravado por la baja profesionalización del periodismo, sitúa a España como uno de los países con menos credibilidad periodística. En este contexto han surgido iniciativas de verificación y *fact-checking*, pero su alcance sigue siendo limitado frente a la magnitud del fenómeno. En Andalucía, Canal Sur mantiene un rol relevante y ha adoptado estrategias digitales, mientras que los hábitos de consumo muestran una brecha generacional significativa.

En el capítulo 3, «Elecciones y comportamiento electoral», Luengo y Bianchi ofrecen un detallado análisis del comportamiento electoral en las seis elecciones (generales, autonómicas y europeas) que se han celebrado en España entre 2023 y 2024, resaltando las dinámicas de fragmentación y polarización que destacan en nuestro panorama político reciente. Aunque las últimas elecciones generales consolidaron el peso del PP y PSOE (que volvieron a concentrar más del 60% de los votos), la incapacidad del PP para formar gobierno evidencia la relevancia de los partidos minoritarios y la necesidad de pactos para asegurar la gobernabilidad. Más allá de los resultados concretos, el valor del análisis reside en el uso de indicadores comparados (volatilidad, competitividad, número efectivo de partidos y desproporcionalidad) que permiten constatar tanto el desplazamiento hacia los extremos ideológicos como la creciente fragmentación del sistema, dificultando la construcción de mayorías estables.

El análisis autonómico (Cataluña, Galicia y País Vasco) y europeo refuerza esta tesis, al mostrar cómo cada subsistema de partidos presenta dinámicas propias que inciden en la fragmentación y en la dificultad de construir mayorías estables. Así, mientras algunos territorios mantienen cierta estabilidad (como, por ejemplo, el PP en Galicia), otros reflejan escenarios altamente volátiles y polarizados (como el avance de EH Bildu en el País Vasco o la fragmentación persistente en Cataluña). El examen de estas particularidades aporta una dimensión comparada que enriquece la comprensión del impacto territorial en la representación política española.

El segundo bloque del libro examina la cobertura mediática de los procesos electorales en España, abarcando televisión, prensa, radio y redes sociales. Serrano-Contreras y Hernández (cap. 4) abordan la cobertura televisiva de las elecciones generales

de 2023, poniendo el foco en los mensajes negativos difundidos y su relación con la polarización política. A través de un análisis computacional de gran escala de más de 2.000 titulares, los autores muestran que, si bien los mensajes negativos no son generalizados, su distribución varía según la línea editorial de cada cadena, sin que sea posible establecer relaciones directas entre el consumo televisivo y el comportamiento político. El principal valor del capítulo radica en su aportación metodológica, al permitir procesar grandes volúmenes de datos mediáticos de forma más eficiente y cruzar variables de contenido, tema y sentimiento, facilitando un análisis más preciso de la influencia de la cobertura televisiva en la polarización política.

Siguiendo la línea de este análisis, el capítulo 5, a cargo de Paloma Egea-Cariñanos y Marco Antonio Ruiz-Pérez, estudia la cobertura de la prensa digital durante la campaña electoral de las elecciones generales de 2023, ofreciendo una perspectiva detallada sobre cómo la personalización de la política se vincula con la polarización mediática. Mediante técnicas de minería de texto, los autores analizan un corpus de titulares de cinco medios nacionales y regionales, evaluando el protagonismo de los candidatos y la toxicidad informativa mediante la herramienta Detoxify. Aunque las diferencias cuantitativas entre medios son muy bajas, los resultados muestran que la atención mediática y el lenguaje agresivo dependen de la distancia ideológica entre medios y candidatos, siendo más tóxicos los titulares que cubren a líderes políticamente distantes. El valor central del capítulo radica, por tanto, en mostrar cómo los procesos de mediación digital condicionan la percepción pública de los candidatos, más allá del volumen de cobertura, aportando evidencia empírica sobre la relación entre personalización y polarización política.

El capítulo 6, de Bernardo Gómez y María Eugenia González, analiza el papel de la radio durante las campañas de 2023 y 2024, destacando su persistente credibilidad frente a la televisión. Desde la perspectiva de la teoría de la *agenda-setting*, las emisoras influyen de manera significativa en la relevancia atribuida a ciertos temas y actores políticos, dependiendo de su línea editorial: COPE refuerza discursos conservadores, SER ofrece un enfoque centro-izquierda y RNE mantiene una postura más neutral. El análisis de boletines revela que los líderes nacionales concentran la mayor atención mediática, mientras que eurocandidatos y propuestas programáticas reciben escasa cobertura. Asimismo, temas como debates, sondeos y polémicas puntuales marcaron la agenda radiofónica. En conclusión, aunque los índices de sentimiento y toxicidad resultan, en términos generales, bajos y sin valores extremos, se aprecian diferencias contextuales: las elecciones autonómicas, y en particular las catalanas, muestran un contenido significativamente más polarizado.

La campaña electoral de las elecciones europeas de 2024 en España es examinada, en el capítulo 7, por Marta Meneu, Lucía Márquez y Guillermo López desde la perspectiva de las redes sociales, con especial atención a X, TikTok y YouTube. A través del análisis de 4.533 publicaciones de 49 perfiles de partidos y candidatos, utilizando codificación cualitativa de sentimientos y tono adaptada a un enfoque multilingüe y audiovisual, los autores muestran cómo la intensidad y la naturaleza de los mensajes dependen de las características propias de cada plataforma: X enfatiza el enfado y

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la indignación, TikTok potencia la alegría y el empoderamiento mediante contenidos virales, y YouTube refuerza sensaciones de seguridad y estabilidad. Se observan diferencias entre partidos y candidatos, con Vox y Podemos liderando la actividad en redes y un predominio general del tono de apoyo, aunque los mensajes de ataque resultan relevantes en actores con estrategias de confrontación más agresivas. El valor central del capítulo radica en demostrar que la comprensión de las *affordances* de cada red es fundamental para interpretar cómo se construye la comunicación política contemporánea y cómo estas plataformas pueden amplificar la polarización y moldear la percepción pública de los candidatos, más allá de los mensajes formales de los partidos.

En el octavo capítulo, Belén Fernández-García estudia la relación ambivalente entre populismo y medios de comunicación, mostrando cómo estos interactúan de manera compleja y contradictoria. En primer lugar, señala la hostilidad discursiva de los actores populistas hacia los medios, a los que acusa de manipular a los ciudadanos, aunque dependen de ellos para obtener visibilidad y legitimidad. La autora evidencia, además, que los medios pueden favorecer indirectamente a la expansión del populismo al sobredimensionar actores y discursos por su valor en el noticiario. El análisis que realiza de *El País* y *El Mundo* (2014-2024) muestra un predominio de discursos antipopulistas con sesgos ideológicos diferenciados: *El País* lo asocia sobre todo a la derecha, *El Mundo* a la izquierda. Fernández-García concluye que los medios actúan como «guardianes de la democracia», pero también contribuyen a deslegitimar adversarios y reforzar la polarización política.

López-Funes y García-Marín, en el capítulo 9, analizan los debates electorales españoles de 2023 a través de tres formatos específicos: el cara a cara Sánchez-Feijóo, el debate a tres (PSOE, PP, Vox) y el debate a siete con inclusión de PANES. Los resultados muestran que, aunque el tono general es negativo, la toxicidad y los insultos varían según el formato y el bloque temático. El cara a cara destacó por su mayor nivel de tensión y por la presencia más frecuente de insultos, en contraste con los debates organizados por RTVE, especialmente el de siete participantes, que presentaron un tono más controlado y dinámico. Los autores identifican a Vox, ERC y EH Bildu como los partidos con mayor agresividad discursiva, y destacan cómo los temas económicos y de política social concentran los mayores focos de confrontación. Los autores concluyen que la polarización se manifiesta en la forma y el contenido del discurso, y que el análisis de sentimiento y toxicidad resulta clave para comprender los efectos mediáticos que afectan indirectamente a la percepción de la audiencia.

En conjunto, *Polarización política y medios de comunicación en campañas electorales* ofrece una visión exhaustiva y rigurosa del impacto de los medios en la dinámica política española reciente. A través de un enfoque metodológico innovador y el análisis de datos de múltiples fuentes, los autores muestran cómo la polarización se manifiesta no solo en los resultados electorales, sino también en la cobertura mediática y la interacción en redes sociales. Los debates electorales y la diversidad de plataformas digitales se presentan como elementos clave que amplifican tanto la confrontación política como la percepción pública de los candidatos. La obra destaca por su capaci-

dad de combinar análisis descriptivo y cuantitativo con reflexión crítica, aportando herramientas valiosas para comprender la complejidad de la comunicación política contemporánea en España y Andalucía. A la vez, el libro invita a la reflexión crítica sobre los desafíos que plantea la transformación digital y la fragmentación mediática para la calidad democrática y la participación ciudadana, consolidándose como un referente para el estudio de la polarización política y mediática en España. Sus resultados dialogan con una literatura reciente que ha documentado la exposición selectiva de las audiencias (Humanes y Valera-Ordaz, 2022; Ramírez-Dueñas y Humanes, 2023), la influencia de la dieta mediática en la polarización afectiva (Melero López *et al.*, 2024) o el alineamiento ideológico de los medios y redes sociales (Guerrero-Solé, 2022; Valdeón, 2023). De esta manera, el libro refuerza y actualiza la investigación sobre comunicación política y polarización en España, ofreciendo un marco analítico sólido y herramientas metodológicas que resultan útiles para estudios futuros.

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