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# ÁNFORA



Global Migrations: Methodological Challenges,  
Institutional Challenges, and Emerging Actors



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# EDITORIAL

## Global Migrations: Methodological Challenges, Institutional Challenges, and Emerging Actors

[English version]

Migraciones globales: desafíos metodológicos,  
retos institucionales y actores emergentes

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### Abstract

The issue "Global Migrations: Methodological Challenges, Institutional Challenges, and Emerging Actors" brings novel research that shows a theoretical-empirical overview of the complexities of migration, the policies and institutions involved in the phenomenon, and the agents, called differently —climate refugees, resident migrants or unaccompanied migrant girls, boys, and adolescents—, share the same structural injustices. It shows the potential to move from discourse to action, the visibility of emerging actors, the agendas and policies around the migration phenomenon, the limits,

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expansion, and epistemological challenges to the growing complexity, transversality, and intersectionality of the migration phenomenon.

**Keywords:** migration; emerging actors; transnational voting; public policy; violence.

## Resumen

El dossier «Migraciones globales: desafíos metodológicos, retos institucionales y actores emergentes» reúne trabajos novedosos que evidencian un panorama teórico-empírico sobre las complejidades de la migración, las políticas e instituciones intervinientes en el fenómeno; así como de los agentes, que si bien reciben diferentes denominaciones —refugiados climáticos, migrantes residentes o niñas, niños y adolescentes migrantes no acompañados—, comparten las mismas injusticias de índole estructural. En él se evidencia el potencial de pasar del discurso a la acción, la visibilización de actores emergentes, las agendas y políticas en torno al fenómeno migratorio, así como los límites, ampliación y desafíos epistemológicos ante la creciente complejidad, transversalidad e interseccionalidad del fenómeno migratorio.

**Palabras clave:** migración; actores emergentes; voto transnacional; política pública; violencia.

## Resumo

O dossiê *Migrações globais: desafios metodológicos, desafios institucionais e atores emergentes* reúne trabalhos inovadores que apresentam um panorama teórico-empírico sobre as complexidades da migração, as políticas e instituições envolvidas no fenômeno, bem como os agentes que, apesar de receberem diferentes denominações — refugiados climáticos, migrantes residentes ou crianças e adolescentes migrantes não acompanhados —, compartilham as mesmas injustiças de caráter estrutural. O dossiê evidencia o potencial de transformação do discurso em ação, a visibilização de atores emergentes, as agendas e políticas em torno do fenômeno migratório, além dos limites, expansões e desafios epistemológicos diante da crescente complexidade, transversalidade e interseccionalidade da migração.

**Palavras-chave:** migração; atores emergentes; voto transnacional; política pública; violência.

Migration has been in man's DNA since it appeared on the earth, at the beginning, it is motivated by the need for survival, and currently is becoming a social phenomenon with multifactorial causes (Guadarrama & Andrade, 2019). International organizations such as the United Nations (UN) are forced to integrate migration into their agendas as a priority (ECLAC, 2018).

The *2023 Agenda for Sustainable Development* is the effort of 193 UN Member States, as well as several actors from civil society, academia, and the private sector, to achieve sustainable development. It integrates economic, social, and environmental dimensions, where the migratory variable cannot be ignored. Therefore, *Goal 10 Reduction of Inequalities*, in its goal 10.7: "Facilitate orderly, safe, regular and responsible migration and mobility of people, including the application of planned and well-managed migration policies" addresses the commitment to the mobility of people as an important element to achieve equality while reducing poverty and, in general, inequalities on sex, age, disability, sexual orientation, race, class, ethnicity, religion, and inequality of opportunities (ECLAC, 2018).

Unfortunately, progress in reducing inequalities and achieving migration governance has not been enough since

In 2022, at least 3,167 people died on sea and land routes to or through Europe [...]. It was also the deadliest year in America and Asia [...]. 1,432 and 1,843 people lost their lives during migration [...]. These data show the lack of progress in reducing migrant deaths worldwide since 2015. (UN, 2023).

The commitment on the academic sector must be reinforced to highlight the new challenges, consolidate progress and put on discussion emerging issues and public agendas of the countries. This issue is part of that collective effort to humanize migration to achieve sustainable development.

The first paper is presented by Ospina and González "Acculturation Stress and Mental Health in Latin American Migrants: A 2010 - 2023 State of the Art Review". The authors highlight the phenomenon of mental health as a main aspect of migration experiences, especially the effects of acculturation by stress. Human mobility processes, issues related to physical survival, or material and legal aspects are prioritized, marginalizing those of a subjective nature, including interpersonal, social, and mental issues. To establish the relationship between migration and mental health, they highlight conditions that can generate a series of problems of an individual nature (subjective aspects) with structural aspects (economy, politics, and culture) that are reflected in negative conditions for mental health. The findings stand out that, although the research on the subject is based on Berry's model for acculturation and acculturation by stress, it is not conclusive or fully explanatory of the acculturation process: It only takes as a reference

point the attitudes and strategies of migrants to adapt to the environment of the receiving society, it does not include the integration processes or reception policies of the receiving society.

Vargas-Chaves, with "Climate Refugees: From Recognition to the Invocability of the Principle of Common but Differentiated Responsibilities", addresses the humanitarian crisis of a new vulnerable group and of special protection through a reflective and proactive exercise that climate refugees face into two major phenomena: forced displacement for climate causes and the absence of mechanisms that directly impact them because they lack the status of refugees with the rights recognized by international environmental law, and the international system for the protection of human rights. This is done through documentary analysis, based on the principle of common responsibility, but makes a difference between developed countries and the most vulnerable countries to climate variations or sea level rise since they are the States that cause climate change from their process of industrialization and economic expansion. This situation demands a duty of greater and permanent cooperation.

To develop the principle of common but differentiated responsibility, it approaches the current climate crisis. Thus, it addresses the research of the social impacts of human mobility caused by climate factors. It reviews the cases of Kiribati and Tuvalu as States that are at risk of disappearing before the middle of the 21st century to finally approach the problem of recognition of the status of climate refugees that becomes a humanitarian crisis that must be solved by the international human rights protection system. It concludes that the principle of common but differentiated responsibility can be an opportunity for environmental protection, to jointly and coordinated overcome climate change and the problems of climate refugees, to guarantee a sustainable future and a habitable planet in dignity for all, so refugee status must also be updated and extended.

"Political Participation of Organized Migrants with Permanent Residency in Chile (1994 – 2024)" is the third paper. Luque *et al.* state and explain the production of political rights of immigrants in Chile. It is based on the analysis of the political participation of immigrants with permanent residence in Chile (1994–2024) from a qualitative-quantitative approach. They analyze the epistemological rupture that allows reforming national mechanisms to take them to the post-national and transnational dimensions because, despite Chile having one of the most advanced legislations related to the political participation of migrants, there are still limits that define political rights. The authors criticized the hegemonic liberal/neoliberal democracy model in Latin America, the effects of globalization, and the progressive decline of methodological nationalism as a unifying space for three institutions of political modernity: the State, democracy, and citizenship. Institutions in Chile have been reconfigured through two processes,



epistemological transnationalism, and epistemological post-nationalism, whose presence is concomitant with the globalization in dispute, neoliberal and that allowed to examine 2012 the reconfiguration of citizenship, separating it from the idea of nation and nationality, and distinguishing the political rights of citizenship. To achieve the goal, they resort to theoretical-epistemological references anchored to migration and the reconfiguration of the political citizenship of these populations in Chile, as well as legal and empirical references, and recover historical milestones of international migration in Chile and policies in the field.

The fourth paper by Cruset, entitled: "The Transnational Vote of the Diasporas of Sub-National States: The Case of the Autonomous Community of Navarre," aims to analyze the vote that Navarrese with Spanish citizenship makes from abroad to check their implications as international actors in the elections of 2015, 2019, and 2023. The research focuses on subnational states that do not have their own sovereignty and, consequently, cannot grant citizenship or the right to vote. The methodology is mainly descriptive, it takes data from the Central Electoral Board and the Ministry of the Interior of Spain to explain the participation of the group observed. One of the conclusions is that the participation of voters from abroad in the Navarrese regional elections has not been numerous or decisive, even though it has gradually grown thanks to the legislative reforms that have been developed. As the extent of participation increases, the interest in the foreign vote will also increase and will generate a virtuous spiral that will benefit everyone.

In "Political Philosophy and Migration: Contemporary Debates Within the Framework of Methodological Nationalism", León Rojas masterfully reconstructs several debates raised from contemporary political philosophy. The author appeals to the theoretical-argumentative structures that arise to the migration phenomenon. The dominant paradigm of methodological nationalism has deeply shaped the few reflections on international mobility. This explains the cognitive bias that moves between ignoring the phenomenon or reinforcing the idea of the nation-state as the unique and main framework of analysis. The methodology was based on a documentary review of different schools of philosophical thought on migratory flows. The author divides the study into three parts. The first is the different debates of philosophical theorists on the dilemma of closing or opening borders. The second is the discussions on migration developed from the cosmopolitan perspective of justice. The third is developing an interest in overcoming the sequels of methodological nationalism in the debates on the ethics of migration. It all leads to the conclusion that political philosophy has uncritically accepted the structural injustices of the migration governance regime. Thus, the approaches broadening by establishing a more fluid dialogue with the

social sciences would generate more fruitful discussions and differentiated effects of migration processes in several communities and their moral implications.

Fernandez Tapia in: "Citizenship and International Migrations: Transnational Political Participation and Vote of Peruvian Immigrants, 1980-2024" implements a qualitative methodology and content analysis. It is based on official data and empirical studies that characterize the political participation of Peruvian immigrants in Spain, Italy, Chile, Argentina, and the United States. The significant growth in participation until the 2016 elections, and a significant decrease by 2021, was one of the main findings. It is replicated in the case of referendums. The absenteeism is high and the vote is preferably conservative. The participation of civil society and religious associations as drivers of transnationalism and transnational citizenship is highlighted. Another conclusion in the electoral activism of Peruvians has to do with the community in cyberspace; it has made it possible to enhance information through platforms such as YouTube and digital networks for communication and activism. Hybrid transnational citizenship also facilitates the exercise of rights and communication to what the author calls "digital transnational citizenship."

The last four papers present a unique opportunity to explore the complex realities by migrant children in Latin America.

Erika Tapia leads us to reflect on the violence by unaccompanied migrant children and adolescents in Mexico, who are in a situation of extreme vulnerability to organized crime. An exhaustive review of national and international documentary sources reveals factors such as economic precariousness and the lack of state protection that facilitate their recruitment for organized crime. The results are alarming: The minors are used for criminal activities because of their homelessness and the absence of effective protection policies. The author concludes that unaccompanied migration is a serious expression of social exclusion, and that it is crucial to strengthen protection and prevention mechanisms to guarantee their rights.

Munevar-Meneses and Giorguli Saucedo compare the educational results of young immigrants in Mexico with those born in the country with migrant ancestry. Three groups are analyzed: Generation 1.5 (migrants born in another country), generation 2.0 (children of foreign parents born in Mexico), and Generation 2.5 (descendants of mixed unions). From the 2020 Population data and Housing Census, significant inequalities in attendance and school lag among these groups are identified. Children in the 1.5 generation face the greatest barriers to school attendance and high levels of educational lag, while children in mixed unions show better results. The research highlights the importance of inclusive educational policies that guarantee the right to education of this

population, it highlights that migration and parental origin significantly influence school integration.

López Álvarez and Ocampo Castaño take us to Soacha, Colombia, where the assemblage of Venezuelan migrant children is analyzed. A qualitative approach based on the historical hermeneutic paradigm, narratives and artistic expressions are used to understand their migratory experience. The findings reveal that, despite the vulnerability inherent in the migration process, these children develop capacities for affiliation, adaptation, a sense of belonging, autonomy, and identity. The welfare perspective is questioned, and it is proposed to recognize children as agents of political and social change. It is concluded that it is essential to overcome deficit approaches and generate policies that promote children's participation in the construction of their environments.

Finally, Carvajal, López, Tabares and Dorado present a systematic review of the educational inclusion of migrants in Latin America in schools. A total of 72 scientific articles from databases such as EBSCOhost, Redalyc, Dialnet and SciELO are analyzed under the PRISMA protocol. The results reveal that, although access to education is facilitated, the permanence of migrant students is hindered by administrative problems, discrimination, social-emotional impacts and linguistic and cultural barriers. Teachers try to adapt their teaching methods to promote inclusion, although they are often limited. The need for comprehensive educational policies that address both academic achievement and the needs of the educational community is highlighted. It recognizes that education systems face challenges in ensuring the effective inclusion of migrant students.

These papers offer a comprehensive look at the complexities by migrant children in Latin America, from vulnerability to organized crime to educational and social challenges. They highlight the need for effective policies that address both the protection and educational inclusion of this population, promote an approach that recognizes migrant children as active agents in the construction of their own realities.

In conclusion, the papers of this issue in Revista *Ánfora* offer an enriching and fresh theoretical overview of the complexities of migration and its actors. It offers a critical and multidisciplinary analysis of topics such as voting, access to education, acculturation, and mental health, and the vulnerability of specific actors such as migrant children and adolescents or climate refugees, among others. Through this issue, research and reflections allow a more comprehensive understanding of the implications of migration and how to generate proposals for its approach from different areas.

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GLOBAL MIGRATIONS:  
METHODOLOGICAL  
CHALLENGES,  
INSTITUTIONAL  
CHALLENGES, AND  
EMERGING ACTORS

# Research & Reflection

Investigaciones y reflexiones  
Pesquisa e reflexão

# Acculturation Stress and Mental Health in Latin American Migrants: A 2010- 2024 State of the Art Review\*

[English version]

Estrés por aculturación y salud mental en migrantes  
latinoamericanos: una revisión del estado del arte del 2010 - 2024

Estresse de aculturação e saúde mental em migrantes latino-  
americanos: uma revisão do estado da arte 2010 – 2024

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## Abstract

**Objective:** To analyze research on the relationship between mental health and migration, identifying the creation of this field from the acculturation stress category

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and its investigation in migrant populations of Latin American origin. **Methodology:** Documentary review analysis was favored. Eighteen studies were found that account for approaches to the relationship that has been defined: acculturation stress and mental health in migrants. This aspect guided the eligibility criteria and exclusion from the study. **Results:** The importance of intercultural psychology in developing the concept of "acculturation" was identified, which describes migration's effects on individuals' mental health. The development of this issue in migrants in high-income countries is identified from approaches that do not include intersectional variables and are dominated by quantitative studies. **Conclusions:** An advance was found to be made in the relationship between mental health and migrations from acculturation stress approaches in international migrations of people of Latin American origin. However, it remains a marginal object of study. The review concluded that mental health is not relevant in studying migratory experiences. The concept of "acculturation" is critically exposed, which implies the adaptation of the migrant outside the provisions of the receiving societies, enhancing or reducing the mental health risks of migrants.

**Keywords:** stress; acculturation; migration; mental health (obtained from UNESCO thesaurus).

## Resumen

**Objetivo:** analizar investigaciones sobre la relación entre salud mental y migraciones, identificando la construcción de este campo desde la categoría de estrés por aculturación y su indagación en poblaciones migrantes de origen latinoamericano. **Metodología:** se privilegió el análisis de revisión documental. Se encontraron dieciocho estudios que dan cuenta de abordajes sobre la relación que se ha definido: estrés por aculturación y salud mental en migrantes, aspecto que guio los criterios de elegibilidad y exclusión del estudio. **Resultados:** se identificó la importancia que para la psicología intercultural tuvo el desarrollo del concepto de «aculturación», el cual describe los efectos que tiene la migración en la salud mental de los individuos. Se identifica el desarrollo de este tema en migrantes en países de ingresos altos desde enfoques que no incluyen variables interseccionales y con prevalencia de estudios cuantitativos. **Conclusiones:** se halló un avance en la relación entre salud mental y migraciones desde los abordajes del estrés por aculturación en las migraciones internacionales de personas de origen latinoamericano, sin embargo, sigue siendo un objeto de estudio marginal. Se concluye que la salud mental no es una cuestión relevante en el estudio de las experiencias migratorias. Se expone críticamente el concepto de «aculturación» que implica la adaptación del migrante al margen de las disposiciones de las sociedades receptoras, las cuales potencian o reducen los riesgos de salud mental de los migrantes.

**Palabras clave:** estrés; aculturación; migración; salud mental (obtenidos del tesouro de la UNESCO).

## Resumo

**Objetivo:** analisar pesquisas sobre a relação entre saúde mental e migração, identificando a construção desse campo a partir da categoria de estresse de aculturação e sua investigação em populações migrantes de origem latino-americana. **Metodologia:** foi privilegiada a análise da revisão documental. Foram encontrados 18 estudos que dão conta de abordagens da relação definida: estresse de aculturação e saúde mental em migrantes, aspecto que orientou os critérios de elegibilidade e exclusão do estudo. **Resultados:** foi identificada a importância para a psicologia intercultural do desenvolvimento do conceito de “aculturação”, que descreve os efeitos da migração sobre a saúde mental dos indivíduos. Identificamos o desenvolvimento desse tópico em migrantes de países de alta renda a partir de abordagens que não incluem variáveis interseccionais e com prevalência de estudos quantitativos. **Conclusões:** foi encontrado um avanço na relação entre saúde mental e migração a partir das abordagens do estresse de aculturação na migração internacional de pessoas de origem latino-americana, porém, ainda é um objeto de estudo marginal. Conclui-se que a saúde mental não é uma questão relevante no estudo das experiências migratórias. O conceito de “aculturação” é exposto de forma crítica, o que implica a adaptação do migrante fora das disposições das sociedades receptoras, o que potencializa ou reduz os riscos à saúde mental dos migrantes.

**Palavras-chave:** estresse; aculturação; migração; saúde mental (extraídas do tesouro da UNESCO).



## Introduction

Migration processes have been transversal throughout humanity's history. However, the rise of globalization —added to social, economic, environmental, and political problems— has increased migration worldwide and in Latin America and has taken an essential place within the contemporary socio-political landscape. Interest in this phenomenon has been gaining ground in the field of psychology. Intercultural psychology developed the concept of "acculturation," which describes the effects that migration has on individuals in their process of "adaptation" to a new society and its impact on people's mental health, seeking to explain it through the concept of "acculturation stress".

Taking into account how migratory processes in Latin America have been developing for approximately 10 years, this study aimed to identify the state of the art on this issue by reviewing studies focused on acculturation stress and the mental health of Latin American migrants between 2010 and 2024. This is one of the periods with the greatest dynamism in South-South migration phenomena, from the theoretical approaches in which migration and mental health are related in the perspective of adaptation and acculturation.

## Theoretical Foundation

### Migration and Mental Health.

Migration is a structural phenomenon throughout human history (Gutiérrez et al., 2020). It consists of the displacement of one or more people within a familiar or foreign territory (*World Health Organization* [WHO], 2016) (Internal and international migration). The nature of migration is dynamic and multidimensional (Cabieses et al., 2018). This can be understood in light of migratory processes that occur as a result of the deepening socioeconomic and political problems related to social and political instability (Sheller & Urry, 2016; Monetti, 2017; Canales et al., 2019).

In general, individual or collective migratory movements, to another city or country, seek to improve the possibilities of vital development of individuals or groups (Soto et al., 2019; Economic Commission for Latin America [ECLAC], 2006). However, migration generates economic, political, social, and cultural effects both in the host society and in the expelling societies. Likewise, it can create a series of individual problems that are reflected in harmful conditions

for mental health (Urzúa et al., 2017b). Migration is a phenomenon in which the relationship between structural aspects such as economics, politics, and culture with subjective aspects is noticed; hence, considering it as an object of study within psychology is crucial.

Likewise, the literature around this issue has highlighted that migratory processes significantly benefit the society of origin and the recipient. Thus, for example, when there are migration processes in sectors of an economically active society, sending remittances and the availability of jobs are promoted. Consequently, there is a decrease in inherent conflicts based on material and subsistence difficulties. In the receiving society, an increase in the supply of skilled labor and diversification of culture is observed (Gutiérrez-Silva et al., 2020).

In contrast, the adverse effects on the home society include the loss of human capital and the disintegration of families. The impact of this is reflected in demographic change with the increase in the elderly population (Latin American and Caribbean Demographic Center [CELADE], 2012) and conflicts in socialization processes; for example, in the framework of the upbringing of children by grandparents or the extended family. For the receiving society, the negative impact is reflected in the discourses that expose migrants as the cause of the displacement and elimination of jobs and new pockets of poverty; this promotes xenophobia and discrimination toward them (Rodicio & Sarceda, 2019; Bekteshi, 2024).

According to the Migration Data Portal of the International Organization for Migration (IOM), in the mid-2020s, there were 280.6 million migrants worldwide, corresponding to 3.6% of the world population (IOM, 2020). In Latin America, the migrant population increased by 66% between 2010 and 2019, meaning that 42.7 million people migrated from their origin (Acuña-Alfaro & Khoudour, 2020). Latin American countries with the highest migration rate in the region are Venezuela, Colombia, and Brazil (IOM, 2020). The tightening of migration policies in the countries of the European Community and the United States could explain the increase in migration processes within Latin America (ILO, 2017) or what is commonly called "south-south migration."

Due to economic and political circumstances, the migratory flow has increased significantly within Latin America since 2010. The paradigmatic case for its effects in the region is the migration of Venezuelan citizens to neighboring countries, both as a destination and as a region to transit through (Aldana & Isea, 2018).

Given the dynamic nature of migration, authors such as Álvarez (1993) have proposed that migratory processes are divided according to the duration of the displacement and the distance traveled. On the one hand, finding three subdivisions is possible: a) short-term migration, b) long-term migration, and

c) permanent migration. On the other hand, the typology based on the distance traveled is subdivided between long-distance or transcontinental trips, and those that are short-distance occurring between neighboring (border) countries, or in non-neighboring countries but on the same continent (Álvarez, 1993). Another way of understanding migration is by its multi-causal origin. Migrations can be due to ecological, economic, and political causes such as war and persecution (Ayuda en Acción, 2022).

### **Theoretical Approaches to Migrant 'Adaptation' from the Acculturation Category**

Migration promotes an encounter between different cultures and people. Consequently, arriving in a new host society is a "culture shock" that has repercussions on the migrant and the host population (Urzúa et al., 2017a). The migrant must "learn" or incorporate a series of behaviors that allow him or her to participate in the dynamics of the receiving society (Urzúa et al., 2017b); these extend to the adoption of values, norms, and affiliation references (Berry, 2008). These experiences, necessary to achieve "adaptation" or incorporation into the social environment of arrival, have been called "acculturation" (Berry, 2006; Urzúa et al., 2021). From this definition, a certain unidirectionality can be seen in the responsibility of "adaptation" that falls on the migrant, where the provisions of the receiving societies concerning the values surrounding solidarity, multiculturalism, inclusion, and diversity that favor the reception of migrants are left aside.

Berry (1997) developed a two-dimensional theoretical-explanatory model from a cross-cultural perspective that seeks to revise the concept of "Cultural Shock" used by different authors in the 1970s to describe the impact of adapting to a new society (Orozco, 2012). Although there are other dimensions to the definition of acculturation stress, Berry's proposal has been developed from the cross-cultural approach (Fajardo et al., 2008). This concept of Berry is interesting insofar as it implies a negative feeling or state toward the phenomenon of migration regarding the idea of "shock," which is understood as synonymous with rupture in cultural, mental, and emotional terms.

In acculturation, from Berry's model, adaptation to the receiving society is characterized by the possibility of guiding the process based on two general strategies the migrant can opt for. In the first, the migrant seeks to preserve his or her traditions of origin; in the second, he or she directs their efforts to assimilate the customs of the society of origin from the approach and contact with the natives (Berry, 2001). Four specific strategies are derived from these

strategies that potentially allow them to integrate with greater or lesser difficulty, namely: a) integration, b) assimilation, c) separation, and d) marginalization (Berry, 2001; Silva et al., 2016). As can be seen, Berry's and Urzúa's positions are similar in terms of their unidirectional and non-reciprocal perspective on the migrant-receiving societal relationship, in which the different strategies generally depend on the agency capacity of migrants.

Solé (2002) has commented that integration societies seek to maintain their stability through adjustment mechanisms of their elements; so, a new subject will generate conflict; the latter will act as an integrating element of the migrant to the receiving society. From this reading, the reconciliation of the factors previously noted as unbalanced in that recipient-migrant societal relationship is achieved through the second level of this theoretical development called "adaptation." This assumes that the actors involved in the migratory process, as well as the migrant and receiving society, have managed to integrate the culturally acquired knowledge that both possess to facilitate communication mechanisms (Aliaga-Sáez, 2020).

These strategies do not obey a linear process; on the contrary, their use is mediated by factors that lead the migrant to opt for any of these options and, at any time, take another (Orozco, 2012). As Jurado et al. (2017) mention, these can be the similarity of the cultures encountered, the receptivity of the society of arrival, the psychological or adaptation characteristics of the migrant, and the reasons why migration occurred. This allows concluding that no migratory experience is the same for the individuals or host societies involved.

### **What Is Meant by Acculturation Stress?**

The difficulties posed by the acculturation process usually generate an increase in stress levels in the migrant, which is why this phenomenon will be called "acculturation stress" (Urzúa et al., 2017a). The theoretical model maintains that there are different types of stressors triggering acculturation stress: a) interpersonal, b) instrumental, c) social, and sociocultural expressed (Arbona et al., 2010; Sevillano et al., 2013).

The effects of acculturation do not only affect the adult population; as has been found in some studies, children and adolescents also experience acculturation stress (Urzúa et al., 2017a). Research reports that the acculturation stress of parents or primary caregivers usually extends to minors, expressed in the increase in their anxiety levels (León, 2014). In this age group, information is still limited, as studies have focused on the adult population (Urzúa et al., 2019). The literature

has few validated measurement instruments that evaluate acculturation stress in children and adolescents (Mena et al., 1987; Suárez-Morales et al., 2007).

As Nina-Estrella (2018) states, the study of acculturation stress has focused on immigrants, refugees, and asylum seekers. Usually, studies do not focus on the distinction between these categories; on the contrary, the concept of “migrant” encompasses all the realities of the migratory process (Levitt & Glick, 2004). This fact could bias the characteristics of migrants and their migratory experience and, therefore, the results of the studies (Fajardo et al., 2008).

### **Migration and Public Health: Bridges with Mental Health**

Although processes such as acculturation, integration, and/or assimilation pose a challenge for migrants at the psychological or individual level, migration does not necessarily predispose the individual to mental health problems (García-Campayo & Sanz, 2002). However, in some cases, host societies have poor health infrastructure for the care of this population or have migration policies that can be strict and restrictive (Ruiz & Rodríguez, 2020). This can amplify the vulnerabilities of migrants and accentuate the problems of social integration in the places of destination (ECLAC, 2006), a fact that harms only their physical as well as their mental adaptation conditions, as a result of the structural barriers of the host sites (Baeza-Rivera et al., 2024).

In that sense, previous studies suggest that poorly adaptive acculturation strategies in conjunction with a hostile host society are associated with decreased individual well-being and quality of life (Urzúa et al., 2015). This could be explained by the increased reporting of symptoms of mental health disorders in the migrant population (Temores-Alcántara et al., 2015), such as feelings of isolation and rejection (Lee et al., 2013b), anxiety (Hovey & Magaña, 2002), psychosomatic diseases (Bekteshi & Van Hock, 2015), sleep disorders and abuse of psychoactive substances (Arcury et al., 2018). Likewise, the stressful experience can become an inability to adapt to everyday life events (Collazos et al., 2008), and foster the presence of risk behaviors (Rodríguez-Montejano et al., 2015), both physical and psychological. Since stress has repercussions on mental health, researchers have considered that acculturation stress should be taken as a public health problem (Vásquez-Ventura & Ortega-Jiménez, 2021; Akhavan et al., 2004).

## Methodology

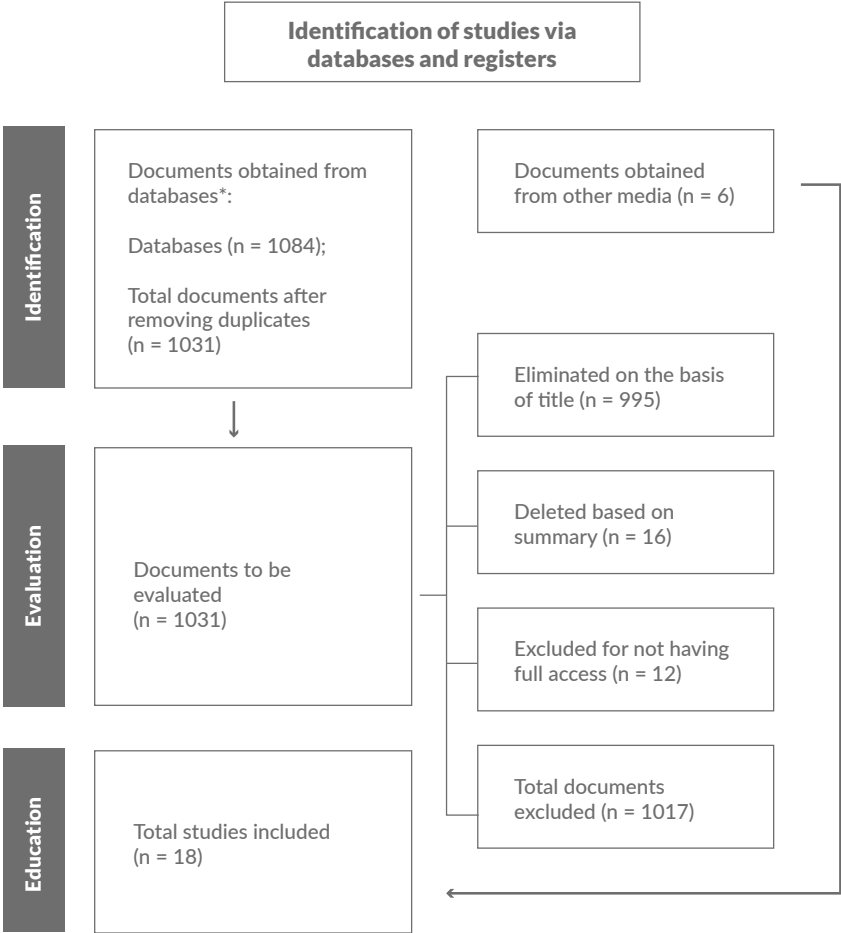
This work addressed the research development of acculturation stress in migrant populations of Latin American origin from the perspective of psychological studies between 2010 and 2024. The review was guided by a documentary analysis strategy, consisting of collecting, analyzing, and synthesizing the results reported in the previous literature to discuss them critically (Fortich, 2013). This facilitates, on the one hand, the current understanding of the subject studied and, on the other hand, promotes the problematization of emerging results and concepts (Zillmer & Díaz-Medina, 2018), as well as the state of knowledge regarding a research field of psychology. Regarding the selected articles that were analyzed, the recommendations of Page et al. (2021) are followed, who argue that defining eligibility and exclusion criteria delimited by the scope of the study's objective is necessary. To achieve this, the following inclusion criteria were used: 1) research results on acculturation stress in migrants of Latin American origin between 2010 and 2024, 2) the study should explicitly address acculturation stress, and 3) the results should be presented in scientific articles in Spanish, English or Portuguese, published in databases of indexed journals. Likewise, the following exclusion criteria were considered: 1) all those studies not carried out with Latin American migrants and 2) that were not part of the reports published in indexed journals.

The databases consulted were PubMed, Redalyc, Scielo, and Scopus; likewise, a manual review was carried out using the Google Academic search engine. An advanced search filter was designed and used in the databases consulted under job eligibility criteria.

The final evaluation and inclusion of the articles were carried out manually from the Mendeley bibliographic management program. First, records published between 2010 and 2024 ( $n=1031$ ) were obtained and manually evaluated by the reference manager. The documents were eliminated based on three filters: a) based on the title, b) based on the summary, and c) discarded for not having complete access to the document. Additionally, ( $n=6$ ) articles obtained by other means were added for a total of ( $n=18$ ) studies that meet the inclusion criteria, of which ( $n=15$ ) are carried out with adult subjects and ( $n=3$ ) schooled adolescents participate. These are primarily quantitative studies, and only ( $n=1$ ) is qualitative. In general, the objectives of the studies sought to establish associations between acculturation stress and mental health variables.

Quantitative studies used to a greater extent the Social, Attitudinal, Family and Environmental Acculturative Stress Scale (Safe) developed by Mena et al. (1987) and its version for children and adolescents (SAFE-C) (Chávez et al., 1997). To a lesser extent, self-elaboration scales and the acculturation stress scale were

used in Latin American migrants (Ramírez et al., 2012). Notably, most studies were conducted with the Latin American migrant population in the United States (n=10), as opposed to studies conducted with Latino migrants in Latin America (n=7) and European countries (n=1).



**Figure 1.** Selection and Evaluation of Scientific Articles Workflow.

Based on the review of the state of the art of acculturation stress and its effects on the mental health of Latin American migrants between 2010 and 2024. The findings of the critically selected articles were explored and compared. The final results are summarized in the table below:

**Table 1.** *Characteristics of the Research Articles Included in the Review.*

Author, Year	Design Type/ Analysis Type	Objective	Sample	Results
(Ugalde-Watson et al., 2011)	Quantitative/ exploratory analysis	Characterize acculturation stress in Colombian refugees and its impact on mental health.	100 adult Colombian refugee participants residing in Costa Rica; (Male = 43%, Female 57%).	Mental health associated with stress due to adaptation to the host society
(Sorbal et al., 2010)	Quantitative, cluster analysis, analysis of variance	Check the acculturation styles proposed by Berry (2006).	750 schooled adolescents of Latin American origin based in Spain (Male 53%, Female= 46% F).	“Separate” acculturation style, high average score with respect to psychoactive substance use
(Lee et al., 2013a)	Quantitative/ multivariate analysis	Identify whether acculturation stress predicts alcohol consumption.	57 Latin American migrants residing in the United States (Male= 52%, Female= 48%).	Acculturation stress does not have a significant association with alcohol consumption
(Cano et al., 2014)	Quantitative/ route study	Examine the association between acculturation stress and depressive symptoms.	115 university students of Mexican origin (Male = 34%, Female = 65%).	High acculturation stress scores are associated with higher depressive symptoms
(Rodríguez-Montero et al., 2015)	Qualitative/ Exploratory	Describe the experience of women who have been deported for use of psychoactive substances.	12 women deported from the U.S.	Acculturation stress can condition the emergence of HIV risk behaviors.
(Urzúa et al., 2016)	Quantitative/ bivariate correlation analysis	Verify the relationship between acculturation stress and the presence of symptoms associated with mental health problems.	431 immigrants residing in Chile for a minimum period of 6 months (Male= 48%, Female= 52%).	Differences with exogroup were significantly associated with the presence of symptoms associated with mental health problems



Author, Year	Design Type/ Analysis Type	Objective	Sample	Results
(Da Silva et al., 2017)	Quantitative/bi-variate analysis, multiple regression	Latina women report increased acculturation stress	530 Latina women in Florida	Acculturation stress and negative religious coping are associated with psychological distress
(Bakhshaie et al., 2018)	Quantitative/bi-variate analysis	Examine the role of anxiety with acculturation	142 Latino adults (Male= 14%, Female= 86%).	Acculturation stress is indirectly associated with anxiety and mood disorders
(Simmons & Limbers, 2019)	Quantitative/t-test for independent samples, Cohen coefficient	Examining Acculturation Stress in Latino Adolescents	168 Latino adolescents –278 non-Latino adolescents enrolled in school	Acculturation stress has a significant association with eating habits
(Zvolensky et al., 2020)	Quantitative/independent mediation models	Evaluate the relationship between acculturation stress and anxiety and smoking.	359 adult Latino smokers (Male= 62%, Female 48%).	Indirect effects were found between acculturation stress, anxiety and cigarette dependence
(Mera-Lemp et al., 2020)	Qualitative / Pearson correlation analysis, cluster analysis	Establish relationships between acculturation orientation, acculturation stress, and psychological well-being.	194 Latin American migrants residing in Chile (Male= 50%, Female= 50%).	Acculturation stress has a significant association with separation-prone acculturation orientation ( $r = 0.33$ ; $p < 0.001$ ).
(Zvolensky et al., 2021)	Quantitative/bi-variate analysis	Explore the influence of acculturation stress with anxiety and symptoms of depressive disorders among people latinas.	142 Latino adults (Male= 14%, Female= 86%).	Acculturation stress was found to predict the presence of symptoms of depressive disorders.

Author, Year	Design Type/ Analysis Type	Objective	Sample	Results
(Salas-Wright et al., 2021)	Quantitative/ multinomial regression	Identify subtypes of young people according to their participation in risk behaviors according to factors of cultural stress theory.	It shows 402 young people (from 10 to 17 years old; 56% men).	Identification of 5 classes of risks.
(Baeza-Rivera et al., 2022)	Quantitative/ transversal	Characterize 3 groups of immigrants from acculturative stress, discrimination and acculturation.	150 immigrants in Araucania from Colombia, Venezuela and Haiti.	The 3 groups used the integration strategy. The acculturation process presented differences according to the country of origin.
(Angelucci et al., 2023)	Quantitative	Describe acculturation stress in Venezuelan immigrants.	1,038 immigrants between the ages of 18 and 30.	Being a woman, not having a job and being a minor predicts more stress due to cultural differences.
(Huamani et al., 2023)	Quantitative	Examine the relationship between acculturative stress and socio-demographic variables.	Venezuelan migrants.	Significant relationships between acculturative stress and health-related quality of life (physical and mental health).
(Baeza-Rivera et al., 2024)	Quantitative	Develop an instrument to measure acculturative stress.	283 migrants in Chile	The findings show psychometric properties with high reliability and validity, as well as cultural relevance. The instrument is appropriate for intra-regional migrant population in Latin America.

Author, Year	Design Type/ Analysis Type	Objective	Sample	Results
(Bekteshi, 2024)	Quantitative	Investigate acculturative stress and its impact on the psychological distress of Mexican immigrant women in the United States, with special attention to the contextual factors that influence these experiences.		Acculturative stress was found to contribute to psychological distress in Mexican immigrant women due to satisfaction with the decision to move to the U.S., language, family, experiences of racial discrimination, and the ability to make the decision to move.

## Results

The findings of the critically selected articles were explored and compared based on the review of the state of the art of acculturation stress and its effects on the mental health of Latin American migrants in the period between 2010 and 2024. Most of the studies found have been carried out in upper-middle-income countries, such as the US., Chile and Spain. Additionally, research is lower in low- or middle-income countries. This is consistent with what was reported in the literature review by Meyer et al. (2017), who explored the scientific production of mental health effects in migrants.

This could suggest that at present the effects of acculturation stress on mental health have not been widely covered in lower-income countries. Therefore, one might say that this low proportion is explained by marginal approaches to migration in undeveloped countries. This is a possible effect of the migratory dynamics of expulsion and not of reception, added to the fact that within the processes of human mobility, issues related to physical survival are prioritized, leaving the mental as a marginal issue (Astorga-Pinto, 2019). That is, the most tangible aspects (material and legal) of migration processes are exalted, and the interpersonal, social, and mental aspects are marginalized.

However, the contributions of Ugalde-Watson et al. (2011) are essential from the perspective of understanding the different dimensions of stress as part of the migratory processes that encompass travel preparation, economic difficulties at the place of arrival, and the process of "adaptation" and/or cultural

integration. Therefore, the analysis of this issue requires multidimensional and diverse perspectives as part of the framework for understanding the complexity of migratory experiences to aspects related to mental health.

The widespread use of non-probabilistic sampling strategies for convenience can be mentioned relating to population selection. This phenomenon could be explained by the difficulty researchers have in accessing accurate data on population sizes in each country (Urzúa et al., 2016). As mentioned above, migration can occur in different ways, marginalizing this population and, therefore, making it invisible within demographic censuses and population characterization processes.

The studies lack an adequate characterization of the population at migrant status, type of migration, or socioeconomic conditions levels. As mentioned, these distinctions are crucial to understanding the phenomenon; they limit the scope of the results concerning their theoretical and practical implications in creating strategies for identifying and mitigating acculturation stress (Fajardo et al., 2008). However, the most recent studies have an approach in which origin and nationality are distinguished. This is based on the dynamics of displacement in Latin America concerning the expulsion of Venezuelan citizens to intracontinental locales and their characteristics in terms of acculturation stress, integration, and psychosocial factors (Angelucci et al., 2023; Huamani et al., 2023; Baeza-Rivera et al., 2022; Salas-Wright et al., 2021; Baeza-Rivera et al., 2024), an important differentiating element for the approach to these research objects.

The term “migrant” is generalized in regards to the weakness of differential approaches to the analysis of the phenomenon. However, as has been explained, migratory experiences are not the same for everyone. Each migrant has particular identities that mark differential patterns as migration is considered a human phenomenon and consequently diverse. The migrant is subject to a situation of vulnerability in many aspects: physical, political, and economic, but the emotional and mental issues must be given relevance as a matter of priority care and health. This goes beyond the order of the personal to become a public matter.

Along the same lines, no study is considered from a gender perspective or considers the differentiation of the LGTBIQ+ population. This could be due to different particularities, but gaps regarding intersectional approaches in migration and mental health are highlighted. This would expand the analyses of what it means to be a migrant and, in turn, part of a sexual, racial, ethnic, or religious minority, as shown by the work of Baeza-Rivera (2022) in the comparison of three diasporas, where ethnic-racial characteristics are related to greater exposure to discrimination.

Regarding the differences between age groups, studies with adults focus on the relationship of acculturation stress with symptoms associated with mental health diseases. In contrast, studies with adolescents pay greater attention to

risk behaviors related to mental health problems, such as the use of psychoactive substances, alcohol, or antisocial behavior (Rodríguez-Montejano et al., 2015; Sorbal et al., 2010; Lee et al., 2013a).

This is not the general approach of studies with adolescent migrants, as reported in the systematic review carried out by Rubio (2020). However, it is necessary to highlight the scarcity of studies on children, who, as has been shown in studies with migrants, may also show problems in their mental health as a result of acculturation stress (León, 2014). These derive from the traumatic processes through which migratory experiences are carried out and the processes of socialization and adaptation that derive from them.

Likewise, the qualitative research found is scarce. These findings are also described in systematic reviews with broader inclusion criteria, such as Vásquez-Ventura et al. (2021) and Rubio (2020). The mainly quantitative approach to social and mental health phenomena ignores the more subjective implications of the phenomenon in question. This could provide nuances to the conception between acculturation processes and their correlation with mental health (Vilar & Eibenschutz, 2007), as well as the exposure of the migrants' voices and experiences.

The findings suggest that acculturation stress has a direct impact on the mental health of migrants, expressed in the presence of symptoms of depression and anxiety, as well as the presence of eating disorders and smoking (Simmons & Limbers, 2019; Zvolensky et al., 2020). However, these data are not conclusive, given that there have not been any longitudinal studies that account for the appearance of acculturation stress and the presence of diagnosable mental health disorders (Urzúa, 2016) or that can account for pre- and post-migration stress levels.

Following Rubio (2020), these studies approach mental health from a disease-centered perspective, which does not allow an extensive understanding of the effects of acculturation stress on mental health. This is a field still under construction but of great relevance not only for the development of psychology but also for the enrichment of migration studies.

The studies evaluated using the Berry model for acculturation (Berry, 1997) and acculturation stress (Berry, 2001) as a theoretical substrate. The results confirm the explanatory usefulness of these models and predict their effects on mental health. This is positive for creating efficient strategies to improve migrant socialization processes within the receiving culture and society (Fajardo et al., 2008).

Most of the studies that start from Berry's model have the replication of this model from the acculturation, integration, separation, assimilation, and marginalization as their purpose (Sorbal et al., 2010). They seek to identify

the synergies and conflicts of cultural order in the processes of acculturation mediated in migratory experiences of people of Latin American origin in countries such as Spain, the United States, and some Latin American countries. The mention of the country stands out because the language factor is fundamental in the processes of integration into host societies and a variable that could mediate stress reduction (Bekteshi, 2024) and the configuration of social networks and social support (Da Silva et al., 2017).

Berry's perspective should not be taken as conclusive or entirely explanatory of the acculturation process as his vision only references the attitudes of migrants in adapting to the environment of the receiving society. This vision eliminates the role that women should have during migration processes as, unstated but understood, it considers migration as a "personal choice". This can be seen in the approaches present in the research explored here since the receiving society plays a passive or contextual role and its effect on the process of acculturation and positive reception that reduces the social and emotional damages in the migrant population. A product of tensions concerning the processes of regularity, access to work and social integration, is not exalted.

## Conclusions

This review of the state of the art infers that studies on acculturation stress and its implications on the mental health of migrants of Latin American origin have limited results. Studies are generally based on Berry's two-dimensional acculturation and acculturation stress model. The results of the studies evaluated by this review agree that this explanatory model is empirically validated. However, they do not seem to provide novel elements to it.

These studies account for the effects of acculturation stress on the mental health of Latin American migrants outside of a public health system that does not value this phenomenon and mental health as part of the fundamental aspects of migration experiences. This could make other conditions that add to the vulnerabilities of the migrant population concerning affective, emotional, and mental health aspects invisible.

Highlighting the limited production of studies on acculturation stress in low- and middle-income countries that could currently be host societies for migrant populations is necessary. This does not in itself indicate the absence of efforts to investigate the phenomena related to migration and the mental health of this population; it is feasible that in these countries, there are antecedents framed with other types of theoretical elements different from those explored in this

review or, that the circumstances and material difficulties prioritize the logics of physical subsistence before mental and/or emotional ailments. The studies are framed in the instrumental, physical, and existential assessments of the migratory experience, and the social, interpersonal, subjective, and emotional are relegated.

As a field of study under development within psychology, the findings highlight the importance of strengthening research with differential approaches and an intersectional perspective. This is to extend the results to historically marginalized populations and subject them to new violations in a migrant condition. Likewise, the investigations must have a qualitative or mixed approach since this would account for subjective processes. Migrants' words, narratives, and versions of their experiences will shed important light on the relationship between migration and mental health.

This is important in the logic of what most of the studies found reveal, which warns of the relevance of the different moments of the migratory experience as triggers of stress or anxiety. That is, reviewing the conditions of departure, transit, arrival, reception, and return of migrants as possible triggers of mental health conditions related to migratory processes is essential. On the other hand, factors such as language, social networks, and supportive communities are central aspects of the acculturation-integration relationship and in the reduction of stressors for migrants.

Finally, the two-dimensional approach evident in Berry's theory is questioned, in which the processes of integration, assimilation, separation, or marginalization depend on the strategies taken by the migrant, even though the receiving society can also carry out integration processes or reception policies that positively take into account the culture of migrants. That is, new approaches that distort the purposes of acculturation understood traditionally, in which migrants are naturalized to strip themselves of their origins and adapt to the host society. An aspect that can result in a deterioration of the mental health conditions of migrants and potential generators of stress.

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# Climate Refugees: From Recognition to the Invocability of the Principle of Common but Differentiated Responsibilities\*

[English version]

Refugiados climáticos: de su reconocimiento a la invocabilidad del principio de responsabilidad común pero diferenciada

Refugiados climáticos: do reconhecimento à invocabilidade do princípio da responsabilidade comum, porém diferenciada

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## Abstract

This article develops a reflective exercise on the principle of common but differentiated responsibilities in the search for solutions to the climate refugee crisis. **Objective:** To establish guidelines on the need to invoke the principle of common but differentiated responsibilities for developed countries, which are

the main contributors to climate change, in relation to the most vulnerable countries facing climate variations or rising sea levels. **Methodology:** This exercise was based on a documentary analysis of information from specialized databases. **Results:**

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Understanding the humanitarian issues faced by environmental refugees and an approach to the principle enabled a constructive scenario regarding the conditions of invocability, based on the privileged situation of developed countries due to their economic expansion and the environmental degradation caused by their industries.

**Conclusions:** The climate refugee crisis warrants the invocability of the principle of common but differentiated responsibilities as a valid approach that challenges States to act jointly and interdependently in order to find alternatives to the migration crisis caused by climate factors.

**Keywords:** refugees; climate change; environmental degradation; effects of human activities; migration (obtained from the UNESCO Thesaurus).

## Resumen

En el presente artículo se desarrolla un ejercicio reflexivo acerca del principio de responsabilidad común, pero diferenciada en la búsqueda de soluciones a la crisis de los refugiados climáticos. **Objetivo:** establecer pautas sobre la necesidad de invocar el principio de responsabilidad común, pero diferenciada de los países desarrollados, que son los principales causantes del cambio climático, respecto a los países más vulnerables a las variaciones climáticas o al aumento del nivel del mar. **Metodología:** este ejercicio se enmarcó desde el análisis documental de información en bases de datos especializadas. **Resultados:** el entendimiento de la problemática humanitaria de los refugiados ambientales, y un acercamiento al principio posibilitó un escenario propositivo respecto a sus condiciones de invocabilidad, sustentadas en la situación privilegiada de los países desarrollados gracias al proceso de expansión económica y la degradación ambiental ocasionada por sus industrias. **Conclusiones:** la crisis de los refugiados climáticos amerita la invocabilidad del principio de responsabilidad común, pero diferenciada como una aproximación válida que le plantea un desafío a los Estados de actuar de forma conjunta, e interdependiente con el fin de buscar alternativas a la crisis migratoria ocasionada por causas climáticas.

**Palabras clave:** refugiados; cambio climático; deterioro ambiental; efectos de las actividades humanas; migración (obtenidos del tesoro de la UNESCO).

## Resumo

Este artigo desenvolve um exercício de reflexão sobre o princípio da responsabilidade comum, porém diferenciada, na busca de soluções para a crise dos refugiados climáticos.

**Objetivo:** estabelecer diretrizes sobre a necessidade de invocar o princípio da responsabilidade comum, porém diferenciada, dos países desenvolvidos, que são os principais causadores das mudanças climáticas, em relação aos países mais vulneráveis às variações climáticas ou ao aumento do nível do mar. **Metodologia:** esse exercício foi baseado na análise documental de informações em bancos de dados especializados.

**Resultados:** a compreensão do problema humanitário dos refugiados ambientais e uma abordagem do princípio possibilitaram um cenário proativo em relação às suas condições de invocabilidade, com base na situação privilegiada dos países desenvolvidos graças ao processo de expansão econômica e à degradação ambiental causada por suas indústrias. **Conclusões:** a crise dos refugiados climáticos merece a invocabilidade do princípio da responsabilidade comum, porém diferenciada, como uma abordagem válida que desafia os Estados a agirem de forma conjunta e interdependente a fim de buscar alternativas para a crise migratória induzida pelo clima.

**Palavras chaves:** refugiados; mudança climática; degradação ambiental; efeitos das atividades humanas; migração (extraído do tesouro da UNESCO).

## Introduction

Climate refugees, as a vulnerable population group forced to relocate to other territories or countries due to climatic causes, have become one of the most urgent challenges the international community must address in its efforts to combat climate change. This migratory phenomenon, driven by poor living conditions in their home territories and leading these refugees to leave their own country, is causing a humanitarian crisis that is already beginning to be seen primarily in the South Pacific Island states, such as Kiribati and Tuvalu (McNamara, 2015).

At the same time, while states are making commitments within the framework of international climate change negotiations, such as increased investment in clean technologies, financial cooperation, and knowledge transfer, there is also a clear need to adopt a constant commitment in the search for solutions to the problem of climate refugees (Hartmann, 2010; Biermann & Boas, 2010).

In this article, which examines the situation of climate refugees, the objective is to establish guidelines for discussion on the need to invoke the principle of common but differentiated responsibilities. This aims to assign a permanent and greater duty of cooperation from developed countries, which are the main contributors to climate change, in relation to the most vulnerable countries facing climate variations or rising sea levels.

The methodology chosen to achieve this objective was the documentary analysis of specialized information, through which it was possible to construct a niche citation at three levels: in-degree, out-degree, and betweenness. This approach allowed the classification and characterization of the extracted information regarding studies on 'climate refugees', 'environmental responsibility', or the 'principles of international environmental law', among other specific topics.

This paper, a product of research conducted under project INV-DER-3439 and funded by the Universidad Militar Nueva Granada, is organized into five distinct sections. First, it provides an overview of the current climate crisis. Second, it examines the social impacts of human mobility caused by climatic factors. Third, it discusses the cases of Kiribati and Tuvalu to offer a final approach to the issue of recognizing the status of climate refugees. Lastly, it develops the principle of common but differentiated responsibilities as a proposed approach. This leads to the discussion and conclusion sections.

As a result, the article presents a reflective and constructive scenario regarding the need to consider the principle of common but differentiated responsibilities by developed countries in relation to climate refugees. This emphasis is based on the privileged situation these countries enjoy today (Pauw et al., 2014; Berkey, 2017), largely due to the industrialization and economic expansion that

began during the Industrial Revolution, with their economic growth driven by the exploitation and global environmental degradation caused by their industries (Hormio, 2023; Leimona et al., 2024; Frumhoff et al., 2015).

Furthermore, this approach is supported by the fact that the territories most severely affected by climate change have minimal capacities to support their population (Taupo, 2019; Edmonds & Noy, 2018; Cauchi et al., 2021). In this context, forced displacement leads to a humanitarian crisis that must be addressed by the international human rights protection system. While there should ideally be no distinction between 'climate refugees' and refugees fleeing social, political, or other causes, in practice, this distinction should be considered (Piguët et al., 2011; Baldwin et al., 2019).

## Methodology

The methodology chosen to achieve the proposed objective was documentary analysis. For this purpose, five bibliometric criteria proposed by Zupic and Čater (2015) were employed in this type of exercise, namely, analysis of bibliographic coupling, co-authorship, co-occurrence of words—words frequently co-occur in documents—, citations, and co-citations. This strategy is effective for conducting documentary analysis studies on very specific topics or those that lack sufficient approaches (Yang et al., 2016).

Following these criteria, a detailed search was conducted in Web of Science, Scopus, Jstor, and Hein Online—specialized databases for articles and scientific research output, including books and book chapters—. Given the relevance and timeliness of this topic, although the initial time frame consulted was 2010–2023, with a total of 105 results in the mentioned databases to build a citation niche at three levels, the search was expanded to include other sources and texts published in the 1980s and 1990s.

The criteria followed for selecting the cited sources were based on three levels or indicators used in bibliometric analysis: in-degree —representing the number of times a document was cited by authors—, out-degree —considering the number of times a document cites others—, and betweenness —based on intermediary connections in a network— (Wallis, 2007; Duque & Cervantes-Cervantes, 2019). This approach enabled the classification of subtopics related to environmental principles, climate change, and migration studies.

Three analytical categories emerged from this exercise, which can be illustratively compared to a tree. The in-degree represents the roots that support the initial approaches to the principle of common but differentiated responsibilities

and the social impacts of climate change, serving as foundational references for the subject of study. For example, this led to authors such as Archer and Rahmstorf (2010) or Houghton and Woodwell (1989).

Next, the betweenness criterion represented the trunk, where documents citing the texts identified in the first criterion were placed —here, we found approaches by authors like Sanson et al. (2019), Berchin et al. (2017), and Lister (2014)—, which are also cited by the more recent documents that make up the out-degree, or the leaves and fruits of the tree, including authors like Klinenberg et al. (2020) and Askland et al. (2022), among others.

In this way, a critical approach to climate change policy was formulated, emphasizing the various actors responsible for the climate-induced migration crisis. This approach aimed to advance the debate towards invoking the principle of common but differentiated responsibilities of developed countries in relation to vulnerable countries, given the humanitarian crisis of climate refugees.

## Results

### Climate Crisis and Human Mobility

The 1950s and 1960s encompassed a period in contemporary history marked by significant social and political turbulence. Movements advocating for civil and political rights and large-scale military conflicts in countries like Vietnam and Korea defined an era of change. However, regarding energy and the environment, the crisis that began to emerge and developed during these decades also had a significant impact on the world.

This crisis triggered subsequent events, such as the oil embargo against the United States and other Western countries by the Organization of the Petroleum Exporting Countries (OPEC) in response to support for Israel during the Yom Kippur War. This not only caused a sudden spike in oil prices but also resulted in a global economic recession (Crosby, 1995; Lattès & Wilson, 2013). At the same time, the environmental crisis that had been ongoing since the Industrial Revolution, which had not yet been relevant to the political agenda, began to chart a new roadmap (Hughes, 2016).

Overpopulation and the effects of unchecked industrialization were contributing to an irreversible deterioration of air, water, and soil (Banister, 2011; Korstanje, 2018). Moreover, the depletion of natural resources, such as forests

and animal and plant species suitable for human consumption, was becoming a growing concern (Orr, 2022; Paterson, 2014). In this context, the Club of Rome<sup>1</sup>, an international forum that brought together scientists, academics, politicians, and leaders from around the world, published a report in 1972 titled *The Limits to Growth*, with support from the Massachusetts Institute of Technology (MIT). This report raised alarms worldwide about the evidence of a potential environmental collapse.

With a nascent political and activist environmental movement emerging globally, the States began to adopt measures to address these concerns. In the United States, for example, the Environmental Protection Agency was established; while in Colombia, Decree 2811 of 1974 was enacted, structuring the *National Code of Renewable Natural Resources and Environmental Protection*. Thus, the action plan gradually implemented in state apparatuses covered a wide range of topics, including air pollution, natural and water resources, biodiversity, and sustainable development.

In climatic matters, the 1980s were significant, as the findings made by the scientific community regarding global warming brought greater prominence to this phenomenon—along with the issues stemming from the destruction of the ozone layer—, not only in the realm of public opinion or the scientific community itself but also in the global political landscape (Archer & Rahmstorf, 2010). Since then, climate change<sup>2</sup> has become a leading environmental issue, recognized as one of the most urgent problems facing humanity<sup>3</sup> (Klinenberg et al., 2020; Sanson et al., 2019).

One impact also associated with climate change is the rising sea level, which has negatively affected human life, ecosystems, and key economic sectors such as tourism. An example of this is Cartagena de Indias, a coastal city in Colombia, that has experienced floods in recent decades that have progressively encroached upon parts of its territory, particularly in areas like La Boquilla, Manzanillo, Bocagrande, and even the Historic Center.

Around the world, rising sea levels are flooding coastal regions, forcing inhabitants to abandon them. This phenomenon, coupled with storms and

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1 The Club of Rome report was a milestone in raising global awareness about environmental issues. Following its publication, the Stockholm Conference was organized in 1972, a historic event that brought together world leaders to discuss the environmental crisis.

2 This phenomenon, caused by the increase in greenhouse gas emissions in the atmosphere, primarily results from human activities such as the burning of fossil fuels, deforestation, livestock farming, and agriculture (Houghton & Woodwell, 1989; Moore, 2003).

3 Not surprisingly, since the Industrial Revolution, deforestation, agriculture, livestock farming, and the burning of fossil fuels (notably oil, coal, and natural gas) have significantly contributed to climate change by releasing CO<sub>2</sub>, methane, and nitrous oxide, among other agents, into the Earth's atmosphere (Hughes, 2009).

flooding, has generated migratory flows toward areas more suitable for living (Lister, 2014). With the intensification and frequency of extreme weather events caused by climate change, displacement has emerged as a critical issue concerning a new vulnerable group in need of special protection: climate refugees, who are often those displaced within their territory or to another due to climatic causes (Berchin et al., 2017; Askland et al., 2022).

Human mobility and the climate crisis manifested as displacement due to climatic causes, can be approached through direct displacement. This is understood as the mobility of individuals forced to leave their homes due to endogenous factors; for example, the flooding of their lands, and direct exogenous displacement, which in this case is caused by external variables to the terrestrial territory, such as rising sea levels (Biermann & Boas, 2008).

In the case of indirect displacement, this phenomenon occurs as a consequence of leaving a territory due to socioeconomic impacts caused by endogenous or exogenous factors; for example, due to the deterioration of livelihoods, food sovereignty, or the degradation of infrastructures that ensure decent housing (Valencia et al., 2015).

Thus, climate refugees are those who, due to direct and indirect endogenous or exogenous causes, become more vulnerable to displacement from rising sea levels, economic, social, or environmental impacts, or other climatic causes (Balesh, 2015). Those who are especially characterized as part of this vulnerable group are the inhabitants of low coastal areas, such as the island states located in the Pacific Ocean, and coastal regions of underdeveloped countries and river deltas (Kirsch, 2020).

In this context, although international instruments such as the *Stockholm Declaration* and the UNFCCC remain important reference points in the development of environmental protection and the guidance of principles regarding adaptation and mitigation measures for climate change, in practice, they do not include mechanisms that directly impact climate refugees (Biermann & Boas, 2010; Rosignoli, 2022).

Despite the above, and even though the vulnerability of this group requiring special protection has been addressed at various Conferences of the Parties (COP) of the UNFCCC, the proposal that has most closely captured this scenario is found in the *Male Declaration* of 2007. This declaration was primarily driven by representatives of island states affected by rising sea levels, aiming to reorient the direction that, until then, the international community had given to the human dimension of climate change (Farbotko et al., 2016).

Thus, there is a strong emphasis on the need to characterize and seek solutions regarding the impacts of climate change on human rights. The *Male Declaration* concludes that the right to enjoy a healthy environment is a



prerequisite for enjoying all other human rights (Jodoin et al., 2021; Holloway et al., 2003).

In sum, this declaration is a historic document that recognizes that global atmospheric warming and rising sea levels are serious problems threatening coastal areas, particularly those located in the South Pacific region (Dolla, 2015). Notably, in the Maldives, one of the signatory states of the declaration, rising sea levels have already begun to affect the rights of its population.

In 2015, several representatives of the signatory states of the *Male Declaration* adopted the *Suva Declaration*, which reaffirms the commitments already made in the first instrument and again calls on the international community to intensify its efforts to combat climate change (Dolla, 2015). During the summit where this declaration was signed, the *Charter of the Pacific Islands Development Forum (PIDF)* was also subscribed, which aims to be recognized as an intergovernmental organization before the international community.

One of its latest pronouncements occurred in 2022, where representatives from several island states, led by Tonga, the Marshall Islands, Fiji, the Federated States of Micronesia, and the Solomon Islands, announced that they would initiate a long path for the International Court of Justice to define the obligations of developed states to protect the rights of present and future generations in light of the global and human issues arising from climate change (Kirsch, 2020; McDave & Dagadu, 2023).

As a preliminary conclusion, the human crisis caused by climate change, evidenced by forced displacement in coastal areas and an increasing number of climate refugees worldwide, is a prelude to a climate emergency and an existential threat to the inhabitants of certain regions (Rosignoli, 2022). The rising sea level is already causing severe problems along the Pacific Islands States and in other densely populated coastal areas, such as the aforementioned Cartagena de Indias in Colombia or the city of Venice in Italy.

## **The Case of Kiribati and Tuvalu, and the Status of Their Climate Refugees**

Kiribati is an island state located in the Pacific Ocean, composed of 32 atolls and one island, with a population estimated at no more than 119,000 inhabitants as of the 2020 census, and its geography is diverse. The Gilbert Islands, the largest group of islands, are coral atolls with white sandy beaches and crystal-clear lagoons. As for the Phoenix Islands and the Line Islands, they are more remote and less populated atolls (Cannon et al., 2021).

Kiribati's economy is based on fishing and tourism. Although fishing is the country's main source of income, tourism has gained momentum since Kiribati

attracted global attention at the turn of the millennium. Despite this, it ranks as one of the most vulnerable countries in the world, both environmentally and climatically, as well as economically (Storey & Hunter, 2010). Most of its inhabitants survive on incomes that place them below the threshold of development, in precarious conditions, and with poor access to basic services (Eurich et al., 2023).

In the last decade, Kiribati has once again come into the spotlight of the media and the international community due to its extreme vulnerability to climate change. Rising sea levels are flooding the islands, and projections indicate that it is expected to be one of the first countries to disappear underwater (Storey & Hunter, 2010; Nakayama et al., 2019; Cauchi et al., 2019). Currently, the government of Kiribati is working jointly with the international community in search of definitive solutions; however, the relocation of its population to other territories will be the next step to be adopted shortly (Mortreux et al., 2023).

With a warm climate and high humidity characteristic of its geographical location, the islands of Kiribati experience little variation in temperature throughout the year, with a prevalence of droughts, especially during seasons associated with *La Niña* phenomenon. Furthermore, the limitations of a very restricted land area, both for the habitation of its citizens and for agricultural models, place this state in a situation of extreme climate vulnerability (Storey & Hunter, 2010).

The case of Tuvalu, another island state situated in the South Pacific, is similar to that of Kiribati. Its geographical location, low elevation, and the constant threats it faces put it in a state of climate vulnerability (Farbotko & Lazrus, 2012). This situation has led both its current leaders and the international community to consider the possibility of relocating its inhabitants, whose population was nearly 12,000 at the beginning of the 2020s (Andrew et al., 2022).

In fact, when analyzing Tuvalu's specific conditions, it can be characterized as a more isolated and smaller country compared to other Pacific Island states, as it consists of just nine habitable islands and atolls with a total land area of no more than 26 square kilometers. Over measurable timescales, both land and sea surface temperatures have been steadily increasing since the mid-20th century, with sea levels rising by 3.9 mm per year. This rate is three times faster than the global average but similar to that of Kiribati (Klepp & Fünfgeld, 2022).

Ocean acidification is another effect of climate variability affecting both countries, disrupting coral reef calcification and impacting marine biodiversity (Islam et al., 2023). Additionally, socio-environmental conflicts have increased in their territories due to soil salinization affecting agricultural production models

and changes in rainfall patterns, along with unpredictable yet increasingly intense events like storm surges, droughts, and winds (Andrew et al., 2022; Klepp & Fünfgeld, 2022; Eurich et al., 2023).

Given this situation, projections indicate that Kiribati and Tuvalu, as states, are at risk of disappearing before reaching the middle of the 21st century. The results of this projection were presented in 2005 at the 60th General Assembly of the United Nations, where the possibility of relocation and the issue of nationals from these two states potentially becoming climate refugees were discussed for the first time (Vousdoukas et al., 2023).

This scenario had already been considered by the Alliance of Small Island States (AOSIS) in the early 1990s as part of the preparatory phase for the Rio de Janeiro Summit (Konrad, 2022). Since then, island states—including Tuvalu and Kiribati—have been lobbying the international community and developed countries to recognize them as Small Island Developing States (SIDS) with their unique climate and environmental circumstances.

This advocacy focuses on the recognition of climate refugees from island states—and generally from any territory affected by climate causes—within the status granted by the 1951 Geneva Convention on the *Status of Refugees*. However, the problem with this recognition stems from the scope defined by Article 1 of the Convention, which establishes a temporal framework for refugee status resulting from events that occurred before January 1, 1951, and as a consequence of such events, as specified in paragraph 2 of Section A of the same article.

In this regard, concerning the impacts caused by climate change, refugee status cannot be granted due to the lack of explicit characterization in the Convention. In fact, those forced to leave their territory due to climate causes lack refugee status and the rights protected by international law.

However, some authors, such as Borrás (2006), who support the inclusion of climate refugees with a special protection status, argue that the 1951 Geneva Convention is a legal framework with a global and comprehensive vocation in favor of any refugee, and that this status has evolved over the years. Similarly, the 1967 Protocol on the Status of Refugees laid the groundwork for a future extension of the definition of 'refugee' under the international human rights protection system.

In contrast to this argument, it has been the recipient states' governments themselves that refuse to extend refugee status, as they do not recognize the link between refugees and forced displacement due to climate causes.

Specifically, displacement «due to persecution» and «due to environmental causes», such as floods or storms, fall into two very different categories. This distinction exists despite the fact that the impacts on the population are equivalent (Loughry & McAdam, 2008; Ďurková et al., 2012). In conclusion, as long as

adverse climate effects are not recognized as causes of displacement, the international community will face a significant challenge in equating climate change to a government, subversive group, or individual in terms of being persecutors.

## The Principle of Common but Differentiated Responsibility: An Opportunity

The principle of common but differentiated responsibility is one of the foundational principles of international environmental law. It was conceived and widely discussed in the *Rio de Janeiro Declaration* of 1992 and has been incorporated into various international instruments, such as the UNFCCC and the *Paris Agreement* (Matsui, 2002).

This principle acknowledges the shared responsibility of all states in environmental protection and addressing climate change, but with a differentiated allocation based on the history, circumstances, and capabilities of some states to fulfill this duty (Rajamani, 2000). Specifically, it establishes that states with a high level of development or those that have disproportionately contributed to environmental damage since the Industrial Revolution bear a greater responsibility than other states.

From the principle of common but differentiated responsibilities, the adoption of special and differentiated measures among states is justified to address global environmental issues within the framework of bilateral and multilateral agreements (Stone, 2004). For example, it requires developed countries to bear a greater financial burden by providing economic and technological assistance to states that lack sufficient means and resources to fully meet their environmental obligations (Bortscheller, 2009; Matsui, 2002).

This principle, which has been key in climate change adaptation and mitigation measures, has led states to agree in forums such as UNFCCC negotiations on the obligation to reduce their greenhouse gas emissions from two standards: a full standard for developing states and a differentiated standard for states under this threshold according to their capabilities (Honkonen, 2009).

In the case of the *Paris Agreement*, the obligations of developed states to provide financial assistance to developing states to meet their emissions reduction goals were established. It also included the duty to provide assistance through technology, training, and enhancing their adaptation and mitigation capabilities.

The common but differentiated responsibility of states in the area of climate change is projected as one of the most pressing challenges currently facing the international community. It is a complex issue, mainly due to the resistance of a

few developed states, such as the United States or China, to meet their obligations (Honkonen, 2009).

In practice, the obligation to reduce greenhouse gas emissions, which are among the main drivers of climate change, represents a significant impact on the productivity of these powers, which are unwilling to sacrifice their economic development in the short and medium term.

Nevertheless, support for affected states has been provided through international cooperation programs, delivering humanitarian supplies during climate disasters, and developing capabilities to address this phenomenon (Hervé, 2010). It is worth noting that cooperation is not part of the principle of common but differentiated responsibilities, but rather pertains to the principle of cooperation, which encourages states to work together to address global environmental issues.

As noted by authors such as Lister (2014), Ďurková et al. (2012), and Berchin et al. (2017), the lack of political will to take the necessary steps to tackle climate change, particularly to reduce greenhouse gas emissions, prevents the effective implementation of the principle of common but differentiated responsibilities.

Although this hinders the adoption of effective measures to address climate change, even at the cost of productivity in activities generating these gases, it is worth considering whether this principle might instead focus on other solutions, such as a coordinated response to the issue of climate refugees, a topic to be discussed in the next section.

Nonetheless, regarding commitments derived from this principle, significant progress has been made in this direction over the past decade. The 2015 *Paris Agreement*, which was a milestone in this respect, succeeded in committing all signatory state representatives to limit the rise in global average temperature to 1.5 degrees Celsius above pre-industrial levels. To achieve this goal, all states, especially developed states, were urged to provide the financial and technological assistance necessary for developing states that could not contribute to this goal.

The principle of common but differentiated responsibility is undoubtedly an opportunity to collectively overcome the challenges posed by climate change. As will be further explored in the next section, it also presents an opportunity for developed states to settle the historical debt they owe to states below this threshold, particularly those whose inhabitants are now victims of climate-induced displacement.

## Discussion

Since the *first SIDS Conference* in 1994 in Bridgetown (Barbados), where representatives of Small Island Developing States developed a roadmap known as the *Barbados Plan of Action* (later updated at the *third SIDS Conference* in 2014 in Samoa through the Samoa Pathway), efforts have been made to recognize climate refugees as having a special *status*.

This recognition is based, on the one hand, on the *Malé Declaration*, and on the other, on the report from the *4th Assessment of the Intergovernmental Panel on Climate Change* (IPCC), which shows that the negative effects of climate change will first impact island countries and the most vulnerable communities, especially those in developing countries.

Additionally, in 2022, representatives of several island states that make up the SIDS announced their intention to bring this strategic litigation to the International Court of Justice. Their goal was to define the obligations of developed states to safeguard the rights of present and future generations in the face of the global climate crisis and concerning environmental refugees. If this litigation is resolved in favor of the claimants, it could mark a turning point in international environmental law (McDave & Dagadu, 2023).

Within this context, the principle of common but differentiated responsibility stands as a cornerstone of international environmental law. It provides an opportunity for the international community to elevate cooperation to a new level in addressing the challenges that come with recognizing climate refugees as having a «refugee» status (Matsui, 2002; Zickgraf, 2019). The cases of Kiribati and Tuvalu could set a precedent, given the inability of local governments to implement plans to migrate to other islands or continental territories or to acquire suitable lands to relocate their inhabitants.

However, the international legal regime that conceives and protects refugee status will never be comparable to the protection that states of origin can provide to their inhabitants in conditions of vulnerability due to climate causes (Konrad, 2022; Borrás, 2006). Assuming that applying the principle of common but differentiated responsibility could solve the problem of climate refugees ignores the root cause of the issue, but it would be a crucial first step.

Achieving this will require political will to overcome these challenges, whether to extend refugee status to this population group or to fulfill obligations derived from the principle of common but differentiated responsibility. The developed and industrialized states that benefited from the boom brought about by the Industrial Revolution and globalization are those that have most contributed to greenhouse gas emissions and thus to climate change, making them the primary actors called upon to seek long-term solutions to this issue.

Regarding the case of Kiribati and Tuvalu, the tendency of the population is to stay within their territory, not only because of the uncertainty of relocating to another country as climate refugees but also due to cultural ties and beliefs that bind them to the land where their ancestors lived. Since the end of the last decade, the population has increasingly seen displacement as a last resort (Loughry & McAdam, 2008).

Another relevant point for invoking the principle of common but differentiated responsibility is that states less affected by their geographical location, which are also in better economic condition, are the ones that have most contributed to the climate crisis affecting island states and other vulnerable territories—for example, states adjacent to the Caribbean—with an increasing trend toward environmental vulnerability due to rising sea levels and recurring natural disasters.

Although refugee status was originally conceived for reasons of political, social, religious, or even racial persecution, the extension of the principle of common but differentiated responsibility should lead the international community to extend this status to climate refugees (Borrás, 2006). This argument is based on the need to update the definition of refugees, which has not changed in recent decades, and to truly apply differentiated responsibility between the affected countries and those with significant influence in multilateral decision-making.

Additionally, legally recognizing climate refugees' status would not necessarily devalue the scope of the regime that currently protects all refugees. It is a form of forced migration driven by environmental factors, constituting a justified exception to the rule of recognition within the context of international human rights protection (Myers, 1993).

The real debate should focus on whether assigning refugee status to climate refugees would lead to renegotiating international instruments. If this were the case, the adjustment process for these instruments should be justified by the need to extend the framework to include other forms of forced displacement.

In this regard, the lack of political will regarding migration policies could be substituted through compensatory obligations related to climate change or by extending these obligations to migration issues within negotiations on climate mitigation and adaptation instruments. This might create a more favorable scenario for overcoming this lack of will (Borrás, 2006).

Ultimately, the common but differentiated responsibility of states in climate change matters—and in migration concerning environmental refugees—, while complex, will be crucial to addressing this global issue shortly. It is about recognizing that this generation, represented internationally by current governments, expects solutions to ensure a sustainable future and a habitable planet with dignity for all.

## Conclusions

Climate refugees, understood as individuals who have been forced to migrate to other territories or countries due to climatic changes and rising sea levels, present a challenge to international environmental law and the global human rights protection system, as they are not covered by refugee status. The lack of political will, as well as the international community's responsibility to address the issue, has stalled any progress in recognizing this status.

In this context, the principle of common but differentiated responsibility held by developed countries in relation to those that are geographically or economically vulnerable to climate change could serve as a crucial first step and a fundamental shift in addressing the issues associated with climate change. This principle could become a key reference point, not only in the effective protection of the environment but also in the strategies for adaptation and mitigation to climate change that the international community implements through cooperation.

The principle of common but differentiated responsibility, which has helped lay the groundwork for actions from the global economic north toward less developed countries, can and should be extended to finding solutions to the migration crisis caused by climate change. This includes cooperation for the resettlement of populations in other countries, the transfer of knowledge, the creation of adaptation capacities to new environments, and support for funding projects that allow these groups to start afresh.

In summary, the fight against climate change is an integral challenge that must consider a series of political, economic, and social variables beyond mere solutions aimed at overcoming the current environmental crisis. It is a challenge that states must face, and one they can overcome if they act together, recognizing their strengths but also acknowledging that they are vulnerable in certain aspects and, therefore, must rely on one another.

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## Political Participation of Organized Migrants with Permanent Residency in Chile (1994-2024)\*

[English Version]

La participación política de los migrantes organizados y con residencia permanente en Chile (1994 – 2024)

A participação política dos migrantes organizados e com residência permanente no Chile (1994 – 2024)

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## Abstract

**Objective:** Analyze the political participation of immigrants with permanent residency in Chile during the period 1994-2024. **Methodology:** A qualitative and quantitative approach was utilized, involving semi-structured interviews with historical leaders of the organized migrant movement in Chile. Additionally, statistical data from the Chilean Electoral Service were analyzed to examine migrant voting patterns during the period 2012-2024. **Results:** Chile has one of the most advanced legal frameworks regarding the political participation of migrants; however, fundamental limitations still persist. This leads to a status of political membership with restricted rights for foreign immigrants with permanent residency in Chile, within a democracy built, as much as possible, through transnational and subnational collective action, as well as through political participation in electoral processes. This has enabled a break from institutional methodological nationalism and has opened the possibility of extending these national mechanisms to postnational and transnational dimensions, reshaping conceptual designs empirically linked to the old notion of the polis in methodological nationalism, and proposing the idea of "Migrápolis": the migrant political subject, and migrant struggles. **Conclusions:** The emergence of a new model of political participation based on the idea of limited political membership was identified.

**Keywords:** political membership; political participation; elections; migration; Chile (from the UNESCO thesaurus).

## Resumen

**Objetivo:** analizar la participación política de los inmigrantes con residencia permanente en Chile durante el período 1994-2024. **Metodología:** se utilizó un enfoque cuali/cuantitativo, para lo cual se realizaron entrevistas semi-estructuradas a líderes históricos del movimiento migrante organizado en este país. Asimismo, se utilizaron datos estadísticos del Servicio Electoral chileno para analizar el voto migrante durante el periodo (2012-2024). **Resultados:** Chile tiene una de las legislaciones más avanzadas en materia de participación política de los migrantes, sin embargo, aún persisten

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limitaciones fundamentales, lo que configura una membresía con derechos políticos acotados para los inmigrantes extranjeros con residencia permanente en Chile, dentro de una democracia construida, en la medida de lo posible, a partir de la acción colectiva transnacional y subnacional, y aquella desarrollada desde la participación política electoral, lo que permitió el rompimiento con el nacionalismo metodológico institucional y abrió la posibilidad llevar estos dispositivos nacionales a dimensiones postnacionales y transnacionales, cambiar diseños conceptuales relacionados empíricamente con la vieja idea de las polis del nacionalismo metodológico, y proponer la idea de «Migrápolis», el sujeto político migrante y las luchas migrantes. **Conclusiones:** se verificó el surgimiento de un nuevo modelo de participación política basada en la idea de la membresía política acotada.

**Palabras clave:** membresía política; participación política; elecciones; migración; Chile (obtenidos del tesoro de la UNESCO).

## Resumo

**Objetivo:** Analisar a participação política dos imigrantes com residência permanente no Chile durante o período de 1994 a 2024. **Metodologia:** Foi utilizado um enfoque quali-quantitativo, com entrevistas semiestruturadas realizadas com líderes históricos do movimento migrante organizado no país. Além disso, foram analisados dados estatísticos do Serviço Eleitoral chileno sobre o voto migrante no período de 2012 a 2024. **Resultados:** O Chile possui uma das legislações mais avançadas em relação à participação política dos migrantes; contudo, ainda persistem limitações fundamentais. Isso configura uma membresia com direitos políticos restritos para estrangeiros residentes permanentes no país, dentro de uma democracia construída, na medida do possível, a partir da ação coletiva transnacional e subnacional, bem como da participação política eleitoral. Esse cenário possibilitou romper com o nacionalismo metodológico institucional e abriu espaço para levar esses dispositivos nacionais a dimensões pós-nacionais e transnacionais. Além disso, permitiu reformular concepções relacionadas à antiga ideia das pólis do nacionalismo metodológico e propor a noção de "Migrápolis", o sujeito político migrante e as lutas migrantes. **Conclusões:** Foi constatado o surgimento de um novo modelo de participação política baseado na ideia de membresia política restrita.

**Palavras-chave:** membresia política; participação política; eleições; migração; Chile (extraído do tesouro da UNESCO).

## Introduction

In recent decades, a body of research has emerged addressing the political dimension of migration without critically engaging with the hegemonic liberal/neoliberal democratic model in the region (Espinoza, 2004; Calderón, 2010; Emmerich & Alarcón, 2016; Guadarrama & Valdéz, 2020). These studies primarily focus on the reconfiguration of political citizenship through political/electoral participation, influenced by globalization and the gradual decline of methodological nationalism as the unifying space for the three most significant institutions of political modernity: the state, democracy, and citizenship. In Chile, these institutions have been reconfigured within two simultaneous civilizational processes that coexist with contested globalizations: neoliberal globalization and grassroots globalization.

The two integrative processes of ongoing globalizations are: "epistemological transnationalism" and "epistemological postnationalism" (Luque et al., 2023; Luque & Hernández, 2024; León, 2024). These processes, which complement each other and critically engage with methodological nationalism, have enabled the examination of the reconfiguration of political citizenship and its transformation into political membership in Chile since 2012, a context in which political citizenship was decoupled from the idea of the nation. This shift led to political membership that permits immigrants to vote in all electoral processes, but not to be eligible for election. All of this stems from a break with methodological nationalism, which maintains unity among the nation, citizenship, and the state:

Methodological nationalism, which upheld the traditional convergence between citizens, society, and the market within the context of the nation-state, lost influence, giving way to new ways of thinking and imagining the connections between "here" and "there," between the country of origin and the country of residence, which led to various transnational actions and perspectives. This generated enthusiasm among scholars of migration, who observed that migration was creating a set of ties that transcended both sending and receiving societies. These researchers developed concepts such as transnational social spaces, transnational communities, social networks, and social and cultural capital. (Luque et al., 2023, p. 68).

This epistemological rupture opened up the possibility of reforming or transferring these national mechanisms into post-national and transnational dimensions. Within these reflections, the formation of political rights for immigrants in Chile and the emergence of a new concept of the city, "Migrápolis," must be situated and explained. However, one question needed to be answered:

under what model of democracy did the aforementioned processes take place in Chile?

### **From the Methodological Nationalist Matrix to the Transnational and Postnational Matrix: The Birth of a Democracy of Exclusion**

To understand the emergence, expansion, and political nature of international migration as an empirical reality, referring to the 1990s, a period marked by changes in the historical connections between Chile and the world is necessary. The neoliberal transformation of Chile under Pinochet's dictatorship began its *Gattopardian* political shift in 1990. With the transition to liberal democracy, the unquestionable criterion of political equality was introduced alongside the normalization of social inequality (i.e., social injustice as the structuring force of Chilean society). This marked the beginning of Chile's technological and economic globalization myth. In this regard, this analysis follows Moulian's (1997) thesis, which asserts:

I consider present-day Chile as a product of Dictatorial Chile, but without accepting either determinism or necessity, or the simplistic idea that a society created with the "materials" of Dictatorial Chile could be nothing other than a photograph of it, a few years later. (p. 15).

Chile's political development was only possible through the combination of four factors: dictatorship, political neoliberalism (liberal democracy), globalization, and the discourse of human rights. Within these coordinates, immigration flourished, particularly of Peruvians migration driven by Fujimori's dictatorship, as well as other migrants escaping the neoliberal reforms in their own countries, only to find themselves in the very heart of the neoliberal stronghold in the region, Chile. In this way, this Andean country became a destination for Peruvians, Bolivians, Colombians, and Ecuadorians (Luque, 2006, p. 137).

From the early 1990s to the present, a regional migratory circuit was established, consisting of population-exporting countries and Chile as a receiving country. But how did the borders open in 1990? What factors explain this openness? The answer lies in the context of liberal transitions toward democracy and the importance of human rights. During the 1970s, military regimes across the region—except in Colombia, Costa Rica, and Venezuela—carried out bloody coups that led to the exile of thousands of their citizens (Roniger, 2024).

The Colombian case was exceptional due to the armed conflict between the guerrilla groups of the Revolutionary Armed Forces of Colombia (FARC),

the National Liberation Army (ELN), and other armed forces that had risen against the Colombian state. *Coups d'état* in the region began in Paraguay (1954), Brazil (1964), Peru (1968), Bolivia (1971), Ecuador (1972), Uruguay (1973), Chile (1973), Argentina (1975), and Peru again in 1992, under the leadership of Alberto Fujimori (Victoriano, 2010, p. 179). For more than two decades, most of the continent's population lived under state terrorism and severe repression. In the face of this reality, the defense of human rights became the last barrier against genocidal repression.

The United Nations High Commissioner for Refugees (UNHCR) estimated that approximately 200,000 Chileans were exiled due to the dictatorship of General Augusto Pinochet (Zamorano, 2021, p. 112). In Argentina, the number of exiles ranged from 30,000 to 250,000 (Jensen, 2022). Meanwhile, the number of Uruguayans forced into exile was estimated at approximately 380,000 (Schelotto, 2015). These three cases represented the largest and most widespread banishments during the military dictatorships of the second half of the 20th century in South America. The U.S. governments of the time played a role in each occurrence.

The international rejection of Pinochet's *coup d'état* sparked an unprecedented wave of condemnation in Latin American history, a region that had already witnessed numerous coups and military dictatorships. In some countries, there was an official response of solidarity from the state, while in others, major political parties still in opposition took a stand, such as the Socialist Party and Mitterrand in France and the Labour Party in Great Britain. In countries like France, Italy, and Spain, massive popular mobilizations took place, with demonstrations of around 100,000 people. (Macleod, 2011, p. 227).

Moreover, the international community supported the Chilean people's struggle against Pinochet's dictatorship. Since then, the human rights narrative has become an essential pillar in building political legitimacy. This rhetoric provided the symbolic space that welcomed international migrants arriving in Chile after the transition to democracy and served as one of the foundations for the expansion of political rights for migrants in the Southern Cone, particularly in Chile. Similar processes took place in Uruguay and Argentina, where human rights became a fundamental cornerstone of post-dictatorial southern political cultures, influencing the extension of political rights to immigrants in Chile.

As a result, the expansion of democracies, the defense of human rights, globalization, information technologies, and neoliberalism paved the way for the emergence of migration's political dimension and its forms of political participation. Without the convergence of these factors, this reality would not have

materialized. For instance, collective migrant actions in Santiago de Chile would have been unimaginable without the use of information technologies. Likewise, highlighting that all these variables impacted migrants' lives, as evidenced by fieldwork conducted in Santiago de Chile and Buenos Aires in the early 1990s is crucial. Various collective actions, organized by migrant and refugee organizations aiming to influence the Chilean governments of that period to grant different migration amnesties, allowing undocumented migrants to regularize their status in Chile were documented.

During those years, we focused on ensuring that the Aylwin, Frei, and Lagos governments granted legal status to the undocumented migrant population through the mechanism of "migration amnesties." To achieve this, we organized marches, public protests, and lobbying in Congress to gain governmental and civil society allies. In this way, we exercised our rights even without possessing the legal documents to do so. (Migrant activist 1, personal communication, March 15, 2024).

Thus, a transnational network began to take shape, involving the political participation of international migrants (Peruvians and Colombians in the social and political life of Chile and Argentina), political communities based on settlement, and, in Peru and Colombia, migrant-sending political communities. During those years, migrants became increasingly connected to more than one nation-state. Without the internet, this would not have been possible. However, human rights also played a crucial role, as it enabled migrants to secure support from civil society organizations in both countries (Luque, 2009).

Human rights functioned as a mechanism of political and democratic inclusion, bridging civil society and the state, which, in turn, facilitated the incorporation of migrants during the 1990s. The exiles of past dictatorships became the very people who extended hospitality to migrants and refugees in the Southern Cone. This contributed to the grassroots development of migration's political dimension in Chile:

We faced a challenge upon arriving in Chile as refugees; at first, it seemed as though we were alone in confronting Fujimori's dictatorship, but that was not the case. In Chile, there was a strong civil society committed to human rights, with organizations such as CODEPU, FASIC, and SERPAJ, among others. These organizations welcomed us with solidarity and supported our two fundamental missions: advocating for the rights of migrants in Chile and resisting Fujimori's dictatorship. (Migrant activist 2, personal communication, March 18, 2024).



This is a significant observation, as it confirms the existence of migrant struggles in this Andean country dating back to the 1990s, alongside two distinct forms of human mobility: political (refugees) and economic (those displaced by neoliberal economic reforms). From this perspective, Chile has remained an attractive destination for migrants in the region for two key reasons: its economic stability and its visa pathway to the United States. According to data from the National Institute of Statistics (INE, 2018), by 2022, 1,625,074 foreign nationals were residing in Chile. Within this historical context, 2012 stands out as a turning point. That year, the Chilean government partially extended political rights to migrants with permanent residency in the country. All of this took place within a liberal democracy, crafted “to the extent possible” and still constrained by the authoritarian enclaves of Pinochet’s dictatorship-era constitution.

### **The Convergence of Transnationalism: Between Destiny and Nostalgia**

Migration flows evolve over time and across different spaces, generating “nodes” that become increasingly complex as time passes. New social dynamics emerge, and identities are redefined, creating both collective and individual identities that are negotiated, blended, and fused between places of origin and destinations. This process establishes a new experience that is not “anchored” to a specific territory (Stefoni, 2004).

The arrival of migrants in host countries gradually transforms these spaces through coexistence and exchange. For example, in Chile, the Peruvian community redefined certain subnational spaces in central Santiago during the 1990s, leading to the creation of “Lima Chica” in the heart of the city (Luque, 2007).

Given this interplay of identities, interaction fosters both differentiation and the cultural construction of the “other,” generating imaginaries, representations, or stereotypes that can either facilitate or hinder migrants’ integration. From this perspective, migrants encountered two discursive logics from Chileans: one rooted in the nationalist social dynamic of friend/enemy relations, and another that prioritized the inclusion of the “other.”

The Chilean Carabineros were very racist toward us and particularly violent and abusive. They wouldn’t let us sell our food on the streets and constantly arrested and insulted us for being “negritos.” That’s when I met the comrades from the Comité de Refugiados Peruanos because they defended us from the “pacos” and were accompanied by Chilean lawyers from CODEPU. That was when I decided to organize—if we just went along with it, we wouldn’t last in Chile. So, I went to

work with my fellow countrymen in "Lima Chica." (Migrant activist 3, personal communication, March 25, 2024).

The ideas of methodological nationalism were reworked, and a concept of transnational imagined communities was constructed, where social, political, and cultural relationships were recreated, particularly at the translocal level (Luque, 2002). This shift brought immigration into sharper focus for various reasons. At the same time, institutional transformations took place, bringing significant changes at the local level. This was particularly evident in the establishment of municipal migrant assistance offices in communes such as Recoleta, Independencia, Santiago, Arica, and Quilicura, among others.

## **A History of International Migration in Chile**

After its independence, Chile began to receive a significant group of migrants from various European countries, primarily Spain, England, Germany, and Italy. In this sense, highlighting that Chile experienced two types of migration is important: "spontaneous" and "planned." The first refers to immigrant groups that arrived in the country of their own accord, while the second involved the state implementing a series of strategies to attract migrants to Chile to promote national growth and progress (Cano et al., 2009).

Independence and the abolition of slavery influenced the development of wage labor and trade, which led to the spontaneous arrival of the first groups of British and French immigrants at the Port of Valparaíso. The British were overseas merchants motivated by the California Gold Rush, coming to Chile to stock up on supplies before heading to the United States. The French, on the other hand, settled in the capital and influenced the educational system with their cultural legacy. Various scholars agree that both groups of immigrants made significant contributions to the country's development (Cano et al., 2009).

In the mid-19th century, planned migration began, with immigration policies aimed at attracting European migrants. There were also national defense considerations due to the imperialist expansion of European countries. In 1850, the colonization of the south began, with German settlers arriving in the rural areas of Valdivia and Llanquihue.

The Chilean state hired and financed German immigrants, offering them land and various concessions. The goal was to "improve the race" of the country by rigorously selecting European migrants while excluding those of Asian and

Arab origin, arriving in Chile later and facing discrimination from locals for being considered members of "inferior races" (Stefoni, 2001).

In the northern regions of Tarapacá and Antofagasta, groups of Asian immigrants arrived to work in the mines. Later, in the 1930s, groups of Arab and Korean immigrants settled in Chile. Additionally, between 1820 and 1880, more than six thousand foreigners arrived, many of whom were deserters from the navies of the United States and various European countries, particularly Britain, Italy, France, and Germany. These sailors entered the country through the ports of Valparaíso, Coquimbo, Talcahuano, Coronel, and Ancud. The recorded numbers of sailors only account for those officially registered on ships, excluding those who were not permanent crew members.

According to the 1865 population census, these immigrants accounted for 27.2% of the total immigrant population in Chile. Many settled in the country through marriage with Chilean women. As Gilberto Harris (2001) notes in his book *Emigrantes e inmigrantes en Chile, 1810-1915. Nuevos aportes y notas revisionistas*, between 1845 and 1885, marriage records from the *Doce Apóstoles* and *Espíritu Santo* parishes in Valparaíso show that 10% of the grooms were foreigners, mainly from the British and U.S. navies. Those who did not marry worked as laborers in supply stores or engaged in smuggling, as they were pursued by maritime authorities from their home countries due to their status as deserters.

At the dawn of the 20th century, immigrants of Yugoslav origin arrived in Chile, settling in what are now the Magallanes and Antofagasta regions under governmental policies. Another group of immigrants who had a strong impact on commerce, particularly in Santiago, were Arab/Palestinian migrants, followed later by Spaniards fleeing the Spanish Civil War. Years later, as a result of World War II, thousands of Europeans migrated to various parts of the American continent (Harris, 2001). The following table presents an overview of this process between 1854 and 2002.

**Table 1.** Evolution of the Foreign Population and Percentage of the Total Population in Chile (1854-2002).

Year	Total Population	Born Abroad	Percentage of Total Population
1854	1 439 120	19669	1,4
1865	1 819 223	21982	1,2
1875	2 075 971	25199	1,2

Year	Total Population	Born Abroad	Percentage of Total Population
1885	2 507 005	87077	3,5
1895	2 695 625	79056	2,9
1907	3 231 496	132 312	4,1
1920	3 731 593	114 117	3,1
1930	4 287 445	105 463	2,5
1940	5 023 539	107 273	2,1
1952	5 932 995	103 878	1,8
1960	7 374 115	104 685	1,4
1970	8 884 768	90441	1
1982	11 275 440	84345	0,7
1992	13 348 401	114 597	0,9
2002	15 116 435	195 320	1,3

Source: Cano *et al.* (2009, p. 12).

During the following years, a clear trend toward increasing numbers of foreigners in Chile emerged. In fact, by 2023, the National Migration Service estimated the number of foreign residents in the country at 1,918,583, meaning that over roughly two decades, this figure had increased nearly tenfold since 2002.

Migration policies were historically characterized as favoring European immigration, a population that ultimately displaced the native and indigenous groups. However, this changed with the arrival of Chile's political transition in 1990. The country opened up to larger migration flows, welcoming people from lower socioeconomic backgrounds, which reshaped the collective Chilean perception of migrants.

Chile's first migration law was enacted in 1850, allowing around 2,500 German settlers to establish themselves in the south, specifically in Valdivia and Puerto Montt. This same law, over the following decades (1859-1890), facilitated the arrival of a large number of people from Asia, who primarily worked in mining in northern Chile. Between 1883 and 1905, more than eight thousand people, Italian, Spanish, and Swiss nationals, arrived in the country.

In 1973, a military coup overthrew the constitutional government of Salvador Allende, leading to a brutal military dictatorship under General Augusto

Pinochet. In 1975, the regime enacted a decree known as the "Immigration Law," aimed at controlling the entry and exit of individuals under the pretext of preventing the infiltration of so-called "enemies" of the regime (Cano et al., 2009). This law remained in effect for over 35 years and continued to regulate migration in Chile. During the successive governments of the coalition, up to President Ricardo Lagos, various initiatives were developed to address migration. However, a new migration law proposed during President Patricio Aylwin's administration was not approved by Congress, and only minor modifications were made. These adjustments were merely temporary measures intended to address immediate migration contingencies.

## **The Bachelet Government and International Migrants**

On June 3, 2013, a new Migration Bill was introduced in the Chamber of Deputies of Chile, signed by President Sebastián Piñera, whose objective was to provide the Chilean state with a new institutional framework to manage migration in the country. The old immigration law was outdated compared to contemporary human rights-based regulations; it lacked sufficient categories of migration status, making it necessary to redesign the Department of Immigration and Foreign Affairs to fit the new context. The bill recognized Chilean citizens living abroad, facilitate deportation and expulsion procedures for unwanted foreigners, and establish clear criteria for validating foreign academic degrees (Charry, 2014).

However, this bill was ultimately inconsequential, as it was discarded by the new government of President Michelle Bachelet in 2014 for being deemed insufficient. Rodrigo Sandoval, head of the Immigration Department, stated in an interview with *Diario La Tercera* that in this bill:

Modern migration models and realities do not fit within the current bill, so the visa structure will be reviewed to introduce different migration modalities that align with reality. One solution to consider is expanding residency models. The important thing is to ensure that the law covers all possible scenarios, something that is not currently being done. (Sandoval, 2014, para. 5).

Therefore, the approach should be modified from one that "considers foreigners and migration a threat, absolutely subordinating people's right to migrate to the criteria of the administrative authority," toward a migration policy with "a perspective of inclusion, regional integration, and a rights-based approach that ensures the effective integration of this population into the country

and allows for dynamic, cooperative, and efficient coordination among all public entities involved in migration policy" (Bachelet, 2005, p. 155).

It is worth noting that during the first two years of Bachelet's administration, several modifications were made to the existing regulations. Although progress on a new law was postponed for a future government, some of the changes implemented included:

- The guarantee of access to healthcare for all immigrants.
- The establishment of a new work visa, which allows immigrants to work for more than one employer, change jobs without additional cost, and engage in any lawful activity. Additionally, once a contract ends, a new one can be signed without requiring a new visa, and permanent residency can be requested after one year of employment.
- The existence of a temporary visa for civil unions, recognizing couples joined through a civil bond, whether celebrated abroad or in Chile, regardless of gender. This ensures full recognition and protection for families in all their forms, guaranteeing equality before the law and removing the discretionary power of authorities or officials in such matters.
- The elimination of fines for minors under 18 years old for violations of immigration regulations. Parents or guardians could not be held accountable either, and if minors had their documents confiscated, they had to be returned. Deportation as a penalty for minors was strictly prohibited, and if a family group was reported, only the adults could be sanctioned.
- The recognition of Chilean nationality for all children of foreign parents born in Chile, regardless of their parents' immigration status. This meant that all children born in Chile were considered Chilean, except for those whose parents were in the service of a foreign government or were merely passing through the country. Consequently, the parents of these children were now classified as provisional residents rather than transient foreigners, regardless of their immigration status. Upon registration, the child was granted Chilean nationality, assigned a national identification number (RUT), and entitled to the same rights as any other Chilean citizen.

- The creation of a visa for convicted individuals, allowing those serving sentences under non-custodial conditions to obtain a permit enabling them to work.

### **Toward a New Institutional Framework for International Migration: New Migration Law 21325 of 2022**

After 47 years in effect, Decree Law 1094 of 1975 was replaced by Law 21325, the New Migration and Foreigners Law, which was enacted on April 21, 2021, and came into force on February 12, 2022. This law seeks to shift the focus from national security to a more socially rights-oriented approach, aiming to enable safe, regular, and responsible migration. The purpose of this New Law is to prevent the irregular entry of foreigners and, consequently, to promote legal, orderly, and secure migration.

Some of its key elements include the following:

- To enter the country, the following requirements must be met: i) entry must be through an authorized border crossing with valid and current travel documents, such as passports, national ID cards, safe-conduct passes, or other recognized documents, and ii) there must be no legal prohibitions preventing entry.
- New migration categories have been established: i) transitory stay: allows individuals to remain in the country for a limited period (90 days, extendable) without prior authorization. In certain cases, it permits remunerated activities; ii) official residence (for diplomats); and iii) temporary residence, which is a permit granted to foreigners staying for a defined period. It is valid for two years, except for temporary workers, and can be extended up to five years; and iii) permanent residence, which allows foreigners to settle indefinitely in Chile and engage in any lawful activity. It is available to individuals with a temporary residence permit who have lived in the country for at least 24 months.
- The subcategories of temporary residence include: i) foreigners engaging in lawful remunerated activities, who must present a contract of no less than three months, ii) individuals with a formal job offer, and iii) foreigners intending to enter Chile to perform specific seasonal jobs for limited, one-time, or recurring annual periods. This permit cannot be extended for more than six months.

However, it is important to note that for this law to take full effect, the necessary regulations and supreme decrees must still be issued. At present, only its declarative sections and transitional provisions are in force, leading to legal gaps in its implementation.

### **The Political Participation of Immigrants Under Chilean Constitutional Regulation: The Emergence of Political Membership**

International regulations concerning the political rights of individuals, regardless of their status, establish that civil and political rights are inalienable and universal. This is affirmed, for example, by the *International Covenant on Civil and Political Rights (ICCPR)* of 1966, the *International Covenant on Economic, Social, and Cultural Rights (ICESCR)*—along with its corresponding optional protocols—and the *Universal Declaration of Human Rights*.

The approach to these rights has been constructed from a methodological nationalist perspective, meaning that migrants are only recognized as having political rights in their country of origin, but not in their country of residence. The ICCPR follows this same logic, formulated under methodological nationalism; Article 25 states that citizens have the right to vote and be elected for representative and government leadership positions. Meanwhile, the Inter-American Commission on Human Rights (IACHR), in the *Inter-American Principles on the Human Rights of All Migrants, Refugees, Stateless Persons, and Victims of Human Trafficking* (Resolution 04/2019), establishes in Principle 31:

Every migrant has the right to participate in the civil and political life of their community in their country of origin and in the conduct of public affairs. This right includes the freedom to engage in public matters of their country of origin and the right to vote and be elected in that country's elections, in accordance with its legislation.

For its part, the *International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families*, in Article 41, addresses the political rights of migrant workers but maintains the foundation of methodological nationalism:

1. Migrant workers and their families shall have the right to participate in the public affairs of their country of origin and to vote and be elected in elections held in that country, in accordance with its legislation.
2. The States concerned



shall facilitate, as appropriate and in accordance with their legislation, the exercise of these rights. (Resolution 45/158, 1990).

Taking into account the points outlined in the previous paragraphs, the Chilean case is unique and exceptional for several reasons. First, Chile distinguishes political rights from citizenship, creating a new form of limited political participation: a specific political membership granted to permanent residents, allowing them to vote but not to be elected. Chile is one of the pioneers in granting such rights, alongside Uruguay, New Zealand, and Malawi. In Latin America, only Paraguay, Uruguay, Ecuador, and Chile recognize the right of foreigners to vote in all types of elections, albeit with certain restrictions. For example, Paraguay requires permanent residence, Ecuador requires five years of residence, and Uruguay imposes a fifteen- years residency requirement, along with additional requirements (Beca, 2019).

Historically, since 1925, foreigners who met specific requirements were allowed to vote—or were at least eligible to vote—in municipal elections at the subnational level. Paradoxically, during one of the most violent military dictatorships of the 20th century in Latin America (referring to the regime led by the Military Junta under General Augusto Pinochet), these political rights were expanded nationwide. This set the precedent for the concept of political membership, which would later be extended to permanent resident migrants in Chile in the 21st century.

In fact, Beca (2019) notes that in the early years of Chilean independence, nationality was not a requirement to vote. The Electoral Regulation of 1810 only excluded foreigners who did not speak Spanish:

“The relevant circumstance for being able to vote was speaking the language of those organizing the nascent republic, without the need to be born in it or even to have any connection to it or its territory” (Beca, 2019, p. 197).

In the 1822 Constitution, the procedural principle linking citizenship to nationality was established. The 1823 Constitution defined that citizenship had two origins: natural and legal. The concept of "legal" allowed individuals who were not born in national territory to acquire Chilean nationality through alternative means, such as marriage or by possessing a profession or capital. It is important to place this argument in its historical context because it marks the foundational moment of the Chilean State and, therefore, the construction of its political institutions, including the institution of citizenship.

The 1833 Constitution reserved the designation of "active citizen" exclusively for Chileans, restricting the possibility for foreigners to access nationality, which became an essential requirement for citizenship and voting rights. Additionally, beyond the requirement of practicing a science, art, or industry, or

having capital in circulation or real estate, a ten-year residency and a declaration of intent to settle in Chile were required. Those married to Chileans only needed two years of residency (Beca, 2019).

The institutional path leading to the granting of political rights to migrants with permanent residency in Chile in 2012 began in 1828 with the issue of nationality acquisition, based on three principles: natural origin, legality, and military service. In 1833, the concept was restricted to the principle of active citizenship. In 1971, under the political inclusion policies of the Unidad Popular government led by Salvador Allende, partial political rights were extended to foreign residents at the subnational (municipal) level.

In 1980, this political participation was expanded to all levels of elections. Finally, in 2012, Chile recognized the voting rights of migrants in human mobility without requiring them to acquire citizenship, allowing them to vote in all elections. To be eligible, individuals had to meet the following requirements: be a foreigner over the age of 18, have five years of residence in the national territory, and not have been convicted of a serious crime. Additionally, Law 20568, enacted in 2012, established automatic voter registration and voluntary voting for all individuals qualified to participate in any election. This allowed resident migrants to be automatically registered. Furthermore, they were granted the right to join political parties.

## **Electoral Political Participation of Migrants in Chile Since 2012**

Electoral participation of the immigrant population in Chile has been relatively low when analyzing the electoral processes that have taken place since 2013, the first year for which general information became available from the Electoral Service of Chile (SERVEL).

When examining the electoral processes of 2021, Table 2 shows that immigrant participation is low compared to that of the Chilean population. However, participation increases slightly in the presidential elections of that year, both in the first and second rounds.

**Table 2.** *Political Participation of Migrants with Permanent Residency in the 2021 Elections Compared to the Chilean Population*

Year	Election	Nationality	Voted	Did Not Vote	Total
2021	Municipal and Constituent Election	National	6 380 136 (44,04%)	8 105 133	14 485 269
		Foreign	66710 (16,1%)	348 414	414 921
	Presidential, Parliamentary, and Regional Council Elections	National	6 984 368 (48,1%)	7 525 667	14 510 033
		Foreign	90578 (20,13%)	359 345	449 923
	Presidential Runoff	National	8 219 831 (56,65%)	7 525 667	14 510 033
		Foreign	104 859 (23,2%)	345 064	449 923

Source: Authors' elaboration based on SERVEL data.

Compared to previous elections, the trend of low participation remains consistent, as shown in Table 3, which includes SERVEL data for elections held between 2013 and 2020. The elections that generated the highest voter turnout among the immigrant population are the 2013 presidential elections (19.2%) and the 2020 plebiscite (20.9%).

**Table 3.** *Political Participation of Migrants with Permanent Residency During the 2020-2013 Elections Compared to the Chilean Population.*

Year	Election	Nationality	Voted	Did Not Vote	Total
2020	Plebiscite 2020	National	7 431 911 (50,9%)	6 985 457	14 590 033
		Foreign	79212 (20,9%)	299 617	378 829
2017	Primaries	National	1 797 019 (13,5%)	11 998 977	13 295 996
		Foreign	15696 (6,1%)	241 131	256 827
2016	Municipal Elections	National	4 891 555 (35,2%)	8 991 045	13 882 600
		Foreign	26727 (11,2%)	211 989	238 716
	Presidential, Parliamentary, and Regional Council Election	National	6 634 620 (49,5%)	6 758 626	13 393 246
		Foreign	34465 (19,2%)	145 432	179 897

Source: Authors' elaboration based on SERVEL data.

Despite this, the electoral participation of the migrant population increased significantly, rising from 20.9% in 2020 to 61.3% in the constitutional plebiscite of September 2022 (SERVEL, 2023).

**Analysis of the 2022 Electoral Roll: Migrant Population**

The statistical information analyzed comes from the databases of the Electoral Service of Chile (SERVEL). These are open data, available on the website of this electoral institution.

The electoral roll includes the total number of registered individuals eligible to vote (citizens and foreign residents) in a given election. According to SERVEL data, as of September 2022, there were 514,623 foreign nationals were registered to vote.

The countries of origin of these individuals with the highest presence in the 2022 SERVEL electoral roll are predominantly from Latin America and include:

- Peru (167,348)
- Colombia (68,432)
- Bolivia (54,409)
- Argentina (31,375)
- Haiti (26,572)

This is shown in the following table.

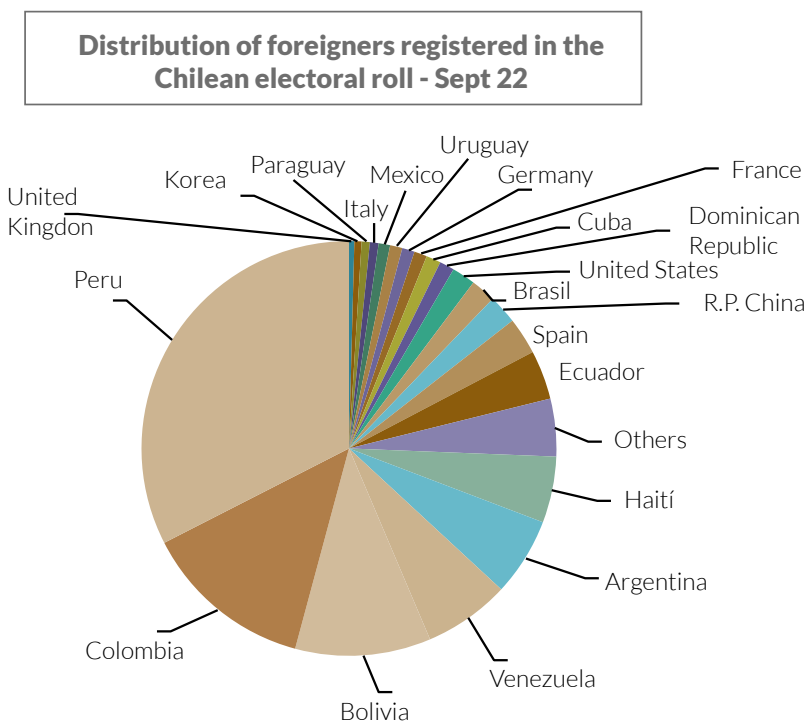
**Table 4.** *Number of Foreign Nationals Registered in the SERVEL Electoral Roll.*

Country	Oct-20	May-21	Nov-21	Sept-22	% Sept-22	Variation 2020 vs 2022 (%)
Peru	138381	149314	157003	167348	32,5	20,9
Colombia	42048	49746	56488	68432	13,3	62,7
Bolivia	43440	47926	50766	54409	10,6	25,3
Venezuela	7148	10260	16153	34605	6,7	384,1
Argentina	28563	29714	30449	31375	6,1	9,8
Haiti	5182	7595	13772	26572	5,2	412,8
Ecuador	15993	17000	17990	19679	3,8	23
Spain	13396	13981	14377	14782	2,9	10,3
Rep. Popular China	9097	10009	10680	11630	2,3	27,8
Brazil	8296	8778	9278	9975	1,9	20,2
United States	8772	9048	9188	9420	1,8	7,4

Country	Oct-20	May-21	Nov-21	Sept-22	% Sept-22	Variation 2020 vs 2022 (%)
Dominican Republic	4589	5038	5453	5922	1,2	29
Cuba	4840	5237	5561	5883	1,1	21,5
France	4541	4756	4926	5130	1,0	13
Germany	4810	4928	4950	5010	1,0	4,2
Uruguay	4614	4748	4832	4941	1,0	7,1
Mexico	3892	4129	4381	4595	0,9	18,1
Italy	3275	3362	3374	3488	0,7	6,5
Paraguay	2714	2947	3082	3295	0,6	21,4
Korea	2712	2776	2817	2866	0,6	5,7
United Kingdom	2007	2055	2085	2130	0,4	6,1
Others	20519	21573	22314	23136	4,5	12,8
Total	378829	414920	449919	514623	100	

Source: Authors' elaboration based on SERVEL data.

The group of foreign nationals in the 2022 SERVEL electoral roll shows a significant presence of people of Peruvian origin, far outnumbering those of other nationalities. However, two countries stand out for their high growth rates in the Chilean electoral roll: Haiti, with an increase of 413%, and Venezuela, with an increase of 384%. In terms of percentage distribution, six countries of origin account for nearly three-quarters of the foreign nationals registered in the SERVEL's electoral roll. These countries are Peru, Colombia, Bolivia, Venezuela, Argentina, and Haiti.



**Figure 1.** *Distribution of Foreigners Registered in the Chilean Electoral Roll - Sept 2222.*

Source: SERVEL.

## **Voting by Registered Immigrants in the 2020 Plebiscite**

The information analyzed is based on the data available in the 2022 SERVEL databases. It indicates that records exist for the total number of people who voted in the 2020 plebiscite. SERVEL registry data show that the percentage of men and women who voted in the 2020 plebiscite was very similar, with a slightly higher participation rate among women (52.4%) compared to men (49.0%).

**Table 5.** Total Number of People Who Voted in the 2020 Plebiscite.

		Sex					
		Female		Male		Total	
		N	% col	N	% col	N	% col
Suffrage	Did not vote	3627003	47,6	3686657	51,0	7313660	49,2
	Voted	3993797	52,4	3548262	49,0	7542059	50,8
	Total	7620800	100,0	7234919	100,0	14855719	100,0

Overall, just over half of the eligible voters, both Chilean and foreign nationals, participated in the 2020 plebiscite, according to the SERVEL records.

When comparing the percentage of Chilean and immigrant voters registered in SERVEL's electoral roll who participated in the 2020 plebiscite, it is evident that foreign nationals showed significantly lower interest in voting. While 51.6% of Chileans participated in the election, only 20.9% of immigrants cast their vote.

**Table 6.** Total Number of National and Foreign Voters in the 2020 Plebiscite.

		Nationality					
		Chilean		Foreigner		Total	
		N	% col	N	% col	N	% col
Suffrage	Did not vote	7014043	48,4	299617	79,1	7313660	49,2
	Voted	7462847	51,6	79212	20,9	7542059	50,8
	Total	14476890	100,0	378829	100,0	14855719	100,0

Source: SERVEL.

Regarding the migrant population that voted (79,212 individuals), the vast majority are unaffiliated (98.3%) with a political party. Among those who are party members, most belong to left-wing or center-left parties: the *Partido Comunista* (184), *Unión Demócrata Independiente* (183), *Renovación Nacional* (175), *Revolución Democrática* (168), *Igualdad* (108), and the *Partido Radical* (104).



**Table 7.** *Political Party Affiliation of Foreigners Who Voted in the 2020 Plebiscite.*

<b>Political Party Affiliation of Foreigners Who Voted in the 2020 Plebiscite.</b>	
Without Party	77876
Comunista de Chile	184
Unión Demócrata Independiente	183
Renovación Nacional	175
Revolución democrática	168
Igualdad	108
Radical de Chile	104
Humanista	79
Por la democracia	64
Socialista de Chile	52
Ecologista Verde	52
Federación Regionalista Verde Social	37
Partido Demócrata Cristiano	32
Ciudadanos	28
Evolución política	24
Partido Progresista de Chile	20
Regionalista Independiente Demócrata	13
Comunes	5
Partido Unión Patriótica	3
Nuevo Tiempo	2
Republicano de Chile	1
Partido Nacional Ciudadano	1
Partido Liberal de Chile	1

Source: SERVEL.

Given this situation, it is important to consider what could be termed "factors influencing migrant voter participation" in order to gradually reverse the high abstention rates in elections. A research note by Navarrete (2021) highlights the main factors to affecting immigrant voting.

- The duration of the migrant's residence in the country and their intention to stay in Chile for the next five years.
- The migrant's political history and experiences in their countries of origin.
- A high probability of voting among those with a Chilean partner.
- Membership in migrant organizations.
- Holding Chilean nationality.
- Having experienced discrimination in some situations.

## Conclusions

The Chilean case is exceptional in the region because it distinguishes between political rights and citizenship, allowing for the institutional emergence of political membership. This mechanism enables foreigners with permanent residency in Chile to access limited political rights: allowed to vote but cannot be elected to positions of popular representation. In this regard, Chile has one of the most advanced legal frameworks for recognizing the political rights of immigrants, allowing them to vote in all elections, from presidential to local (mayors and councilors), as long as they meet the voting requirements.

The Chilean case has significant implications on theoretical and empirical debates for two key reasons. First, it surpasses methodological nationalism as the basic framework for considering and legislating the political rights of non-citizen residents in Chile. By promoting and institutionalizing the idea of political membership for foreigners with permanent residency in Chile, this case generates an institutional innovation that aligns with methodological post-nationalist methodologies. Clearly, political membership differs from citizenship-based political rights and serves as a first step toward a more profound institutional construction in the future.

Second, Chile offers a unique case study for observing the development and configuration of political rights from transnational and post-national perspectives, which are already clashing with nationalist frameworks. This dynamic may contribute to the rise of aporophobic and fascist political movements, as seen in the United States under Donald Trump's leadership and in Italy under the governance of far-right Prime Minister Giorgia Meloni.

Finally, so far, there has been no significant public discussion in Chile regarding the political rights of immigrants. The limited reflection on this topic has primarily come from the vibrant migrant civil society, organized through various migrant collectives.

Meanwhile, in Chilean civil society, the debate has been restricted to discussions on voting rights —both active (the right to vote) and passive (the right to be elected)— from a paternalistic perspective. This raises questions about exclusion and racism in Chile and their impact on the realization of political membership for foreigners with permanent residency. It also evokes the popular Chilean saying, *"Ya verás cómo tratan al amigo en Chile cuando es extranjero"* ("You will see how a friend is treated in Chile when they are a foreigner"), implying that political participation extends beyond elections and that voting is not the only form of political action. A significant advancement in this regard has been the recognition of the right of foreign voters to join Chilean political parties, a change that only came into effect in 2016.

A significant issue highlighted by Pérez et al. (2021), referencing Luis Thayer, the current director of the National Migration Service, is that failing to recognize migrants as rights-bearing subjects creates first- and second-class citizenships: *"where the former (natives) fully enjoy their rights without major access issues, while the latter are considered 'subaltern' or culturally inferior"* (Pérez et al., 2021, p. 3).

Citizenship implies Hannah Arendt's notion of *the right to have rights*, which raises questions about the potential future expansion of political rights. At the same time, considering the exclusionary rhetoric emerging from conservative and anti-immigrant political sectors it is crucial. They aim to roll back the political rights that organized migrants have won since the 1990s through various forms of collective action and organization within migrant civil society. In this regard, recognizing that migrant struggles in this southern country have been centered on dignity, social justice, and the pursuit of a shared, diverse, and democratic space is also essential. The *Migrapolis* that Santiago de Chile embodies this today.

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# The Transnational Vote of the Diasporas of Sub-National States: The Case of the Autonomous Community of Navarre\*

[English version]

El voto transnacional de las diásporas de Estados subnacionales: el caso de la Comunidad Foral de Navarra

O voto transnacional das diásporas estaduais subnacionais: o caso da Comunidade Autônoma de Navarra

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## Abstract

**Objective:** To analyze the emerging challenges resulting from the introduction of new theoretical frameworks, with a primary focus on transnationalism, as applied to migration studies. In particular, the focus on diasporas as international actors and their political participation in both the origin and destination countries centers on issues such as citizenship, dual citizenship, and voting. This work focuses on sub-national states, which, by definition, do not possess their own sovereignty and, therefore, cannot grant citizenship or voting rights. **Methodology:** This is a quantitative study based on data provided by state agencies of the Spanish

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government. **Results:** The analysis shows that transnational participation is low, although it is growing. In such a complex electoral system, every vote is crucial, which underscores the importance of ensuring the diaspora's voice is heard. **Conclusions:** The diaspora's vote is important both for the group and for Navarre, as it provides a different perspective and an additional political approach that is enriching.

**Keywords:** voting; migration; citizenship; nationalism (Inter-American Human Rights Thesaurus).

## Resumen

**Objetivo:** analizar las nuevas problemáticas que surgen de la introducción de nuevos marcos teóricos, principalmente el transnacionalismo, aplicado a los estudios migratorios. Particularmente, el enfoque sobre las diásporas como actores internacionales y su participación política a dos bandas —en origen y en destino— se focalizan en las ciudadanías, dobles ciudadanías y voto. Este trabajo se centra en los casos de los Estados sub-nacionales que, por definición, no detentan soberanías propias y, por lo tanto, no pueden otorgar ciudadanía ni derecho al voto. **Metodología:** es un estudio cuantitativo con base en los guarismos aportados por organismos estatales del Estado español. **Resultados:** el análisis demuestra que la participación transnacional es poca, aunque va creciendo. En un sistema electoral tan complejo, cada voto cuenta y por eso es tan valioso hacer escuchar la voz de la diáspora. **Conclusiones:** el voto desde la diáspora es importante tanto para el grupo como para Navarra, porque aporta otra mirada y otro enfoque político que es enriquecedor.

**Palabras clave:** voto; migración; ciudadanía; nacionalismo (Tesauro Interamericano de Derechos Humanos).

## Resumo

**Objetivo:** analisar as novas questões decorrentes da introdução de novas estruturas teóricas, principalmente o transnacionalismo, aplicadas aos estudos sobre migração. Em particular, o foco nas diásporas como atores internacionais e sua participação política bilateral - na origem e no destino - concentra-se na cidadania, na dupla cidadania e no voto. Este artigo enfoca os casos de estados subnacionais que, por definição, não possuem soberania própria e, portanto, não podem conceder direitos de cidadania e voto. **Metodologia:** este é um estudo quantitativo baseado em números fornecidos

por órgãos estatais na Espanha. **Resultados:** a análise mostra que a participação transnacional é baixa, embora esteja crescendo. Em um sistema eleitoral tão complexo, cada voto conta e é por isso que é tão importante fazer com que a voz da diáspora seja ouvida. **Conclusões:** o voto da diáspora é importante tanto para o grupo quanto para Navarra, pois oferece outra perspectiva e outra abordagem política que é enriquecedora.

**Palavras-chave:** voto; migração; cidadania; nacionalismo (Inter-American Human Rights Thesaurus).

## Introduction

For the past three decades, academia has increasingly studied migration processes on a scale that extends beyond the framework of the nation-state, aligning with transnationalism theories. This underscores the connection migrants maintain with their places of origin, which may encompass economic, cultural, and even political activities. These individuals, who were compelled to leave their homes, often gather in their new places of settlement and form associations that can be classified as diasporic. When these groups begin to engage in both their places of origin and destination, they can emerge as international actors—secondary and derived from sovereignty—and fit within the classic definition of "diasporas" (Safran, 1991), with their own objectives and agendas.

However, much like the academic community, nation-states also shifted their focus towards those groups of people who, for various reasons such as economic hardship, political strife, or religious persecution, were compelled to leave their places of origin. Thus, in recent years, various bureaucratic bodies have emerged in countries with high emigration rates—ranging from ministries to small departments, each with varying levels of influence and budgets—aimed at establishing or revitalizing ties with their diasporas. In this way, these "Motherland Mothers" have attempted to compensate this population by offering economic benefits—such as pensions or allowances—or, in the most extreme cases, by allowing integration into the State's Legislative Power. In this way, citizenships are being restored to those who have lost them, as well as to their descendants, with varying degrees of accessibility and scope (Penchaszadeh & Arlettaz, 2022).

What has been studied even less is the relationship between diasporas and states when the state in question is sub-national, and many of the benefits, bureaucratic structures, and citizenship grants are mediated by the nation-state. If, in addition, there are nationalist claims in these countries—whether cultural, such as the right to use one's own language, or political, such as demands for autonomy or full sovereignty, as seen in Spain—the situation becomes even more complex. For this reason, the case of the Autonomous Community of Navarra has been chosen for this research, as it meets two key premises: it is a sub-national state, and therefore lacks the sovereignty to grant citizenship, and it has its own diaspora with distinctive cultural characteristics (Anaut & Garcia, 2013)<sup>1</sup>.

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1 Acknowledgments to Fernando Lizarbe, representative of GeroaBai in Argentina, for his assistance.



**Figure 1.** *Autonomous Community of Navarra.*

Source: taken from the website of the Ministry of Culture and Sport of Spain.

This article aims to analyze the votes cast by Navarrese citizens with Spanish citizenship from abroad, in order to discern their implications. This work is both descriptive and employs both qualitative and quantitative methods, aiming to serve as a preliminary step in laying the foundation for a more comprehensive study. Initially, it is of interest to analyze the impact of the variable "nationalism," and for this reason, only the data from the regional elections, rather than the general elections of the Spanish State, will be considered. The data was obtained from the Central Electoral Board and the Ministry of the Interior of Spain.

As stated, the concept of "nationalism" is polysemic and does not necessarily imply the political. For this reason, the end of ETA's terrorist activities in 2021 has been used as a chronological framework, as its violent actions distort democracy and the voting process, which are the primary focus of this study.

## **The Issue of Citizenship and Multiple Citizenship**

Although this paper aims to analyze the transnational vote of migrant groups in a sub-national state (the Autonomous Community of Navarre), which by definition lacks the authority to grant citizenship, it is deemed useful to outline some preliminary insights on the subject. This, in order to contextualize the phenomenon, but observing that it is only introductory (González & Luque, 2022).

It is important to mention that the sovereign authority of states determines the obligations and rights of their citizens, either through the adoption of their own regulations or by adhering to international frameworks. In this context,

the Inter-American Court of Human Rights (1999) defined "nationality" as "the legal bond that binds a person to a given State, through which the individual is committed to loyalty and fidelity, and entitled to its diplomatic protection" (Section Eight, p. 36). In addition, Article 20 states that nationality also entails providing a minimum level of legal protection in international relations, regulating nationality, and safeguarding the individual in the exercise of their political rights.

Since 1949, Marshall's pioneering work (Marshall & Bottomore, 1998) on liberal citizenship establishes that it can be expressed in three domains: a) civil (personal freedom and expression, property rights, and access to justice); b) political (the right to participate in the exercise of power); and c) social (social security and economic welfare).

What has occurred in the various studies analyzing this issue is that—given the State's clear priority in this matter—there has been a tendency to overlook the role of civil society, which actively seeks and advocates for these rights. This is especially true for organized migrant groups, referred to as "diasporas," which are often not studied as active agents shaping their own destinies. Until recently, with the introduction of the transnationalism theoretical framework, they were not fully understood as actors influencing both their place of origin and destination.

As Luque (2007) points out, the construction of citizenship is not solely the work of the State but arises from the relationship between the State and civil society.

In this approach, the immigrant has the potential to become an "agency" of citizenship, transforming their political environment through affirmative action, and gradually evolving into a "subject of law" or a "subject in pursuit of rights and civic responsibilities." Transnational citizenship represents a political, social, economic, and cultural space in constant conflict between those excluded from rights and those included who seek to preserve their privileges. It also embodies a longstanding political culture committed to the defense of rights (p. 124).

In relation to the issue of dual citizenship or multiple citizenship, it is necessary to indicate that not all nation-states accept them. In the context of the "social contract," the loyalties that citizens must uphold are often viewed with suspicion by countries, as they tend to distrust the possibility of individuals maintaining "multiple loyalties." For example, in a nation with a strong emigration component such as the Republic of Mexico, only since 1998 has the *Nationality Law* allowed it. In the case of Argentina, it is possible to hold multiple citizenships simultaneously with Argentine citizenship (Penchaszadeh & Arlettaz, 2022).

## Voting From Abroad in Spain

As Gálvez Muñoz (2010) states, remote voting in Spain is one of the two available methods for voters to cast their ballots, the other being in-person voting at polling stations. Although both have different characteristics, as well as pros and cons, they have the same hierarchy. Remote voting is designed to facilitate voting for all citizens, particularly for Spaniards residing outside their territory or those who face difficulties in attending polling stations in person.

The rationale behind this is rooted in the Spanish Constitution, which mandates that all branches of the State ensure, to the greatest extent possible, that nothing impedes the right to vote. Based on this foundational idea, the same author gives a detailed account of the relevant electoral laws. This is contained in *Organic Law 5/1985* regulating the General Electoral Regime (hereinafter LOREG). Specifically in Articles 75 and 190, it refers to resident-absent electors living abroad.

Unlike other countries, such as Argentina, where voting from abroad is regulated and permitted, this voting must be carried out in person at the country's diplomatic missions. In the case of Spain, the option of using mail to send votes has been adopted. This system, also used by other European states, still presents certain shortcomings, including the loss of correspondence, delays in delivery—even arriving after the election—and, in more extreme cases, fraud.

On October 3, 2022, *Organic Law 12/2022* entered into force, which makes amendments to the above. One of these changes is that it eliminates the voter's need to request the ballot, along with everything that this process entailed, such as obtaining the voting papers or the envelope. However, the rule requiring voters to be registered in the CERA (Electoral Census of Absentee Residents) remains in place. With the new technologies available, all voters—whether they have requested them or not—will be able to download the ballots from the internet. In addition, the deadline for depositing your vote at a consular office is extended from 3 to 7 days. Additionally, to account for any unforeseen issues with the mailing process, the period for counting votes arriving from abroad is extended (Ministry of Foreign Affairs, European Union and Cooperation, 2023).

The legislation also considers Spaniards who are temporarily abroad and wish to vote. This particular case will not be addressed in this work, as it is understood that the situation of these individuals is merely circumstantial.

## The Issue of Spanish Citizenship

To understand the issue of Spanish citizenship and who is eligible to obtain it, it is necessary to explain the two fundamental concepts of granting nationality. Thus, it can be said that in legal systems, there are two principles: *Ius Sanguinis* (law of blood), through which nationality is transmitted from parents to children, prioritizing ethnicity over civic affiliation. This method is used by most European countries. The other principle is known as *Ius Soli* (law of the soil), which grants citizenship to individuals born in a specific country, regardless of their parents' origin<sup>2</sup>.

Broadly speaking, European countries, which for much of the nineteenth and twentieth centuries were centers of emigration, now view the granting of citizenship to the descendants of those migrants as, in some cases, a form of historical compensation or reparation. The paradigmatic case is the Italian one (Cruset, 2011b), but also other countries such as Croatia have very broad legislation on this subject.

Spain, as a State, has recently started with this same line. Originally only children of Spaniards born abroad could aspire to be considered Spaniards. In 2007, the *Historical Memory Law* (Law 52/2007) was enacted. This legislation is primarily aimed at establishing measures to support those who were forced into exile due to the Civil War and the Franco Dictatorship.

These reasons include affiliation, collaboration, or association with political parties, trade unions, religious or military organizations, ethnic minorities, secret societies, Masonic lodges, and resistance groups, as well as behaviors related to cultural, linguistic, or sexual orientation. Through this Declaration, Spanish democracy pays tribute to the citizens who directly endured the injustices and grievances stemming from the Civil War and the Franco dictatorship. To those who lost their lives or their freedom as a result of imprisonment, deportation, confiscation of property, forced labor, or internment in concentration camps, both within and beyond our borders. Likewise, those who lost their homeland when they were exiled are recognized.

As evident in this text, the original intent is not to grant citizenship, but rather, it becomes a direct consequence of the legislation itself. Keep in mind that those who were forced to flee the country hastily, fearing repercussions that endangered their lives, often lost or never possessed the necessary documentation to emigrate. In other cases, these individuals left with passports issued by the

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2 To deepen this topic: Stolcke (2000) «La 'naturaleza' de la nacionalidad». To delve into the logic of these routes in national constructions: Cruset et al. (2021).



Republic, which had already ceased to exist as a legal entity, automatically rendering them stateless. This law had a term of validity until 2011.

*Law 20 of 2022* seems to continue with the line of the regulations to which reference was made. In fact, its official name is the *Law of Democratic Memory*, although it is colloquially referred to as the "Law of Grandchildren". Its term of validity is two years, counted from October 21, 2022.

Those born outside Spain to a father, mother, grandfather, or grandmother who were originally Spanish are eligible. Additionally, this applies to those born outside Spain to a father, mother, grandfather, or grandmother who were originally Spanish but lost or renounced their nationality. This loss or renunciation may have occurred as a result of political or ideological persecution, personal beliefs, or due to sexual orientation and identity. Such individuals may regain or claim Spanish nationality under (Law 20, 2022, Disp. Ad. Eight).

Citizenship is also indirectly extended to adult children whose parents were previously granted citizenship under the earlier legislation mentioned.

## **Subnational States and the Spanish Legal System**

When Spain transitioned back to democracy following the lengthy dictatorship, the political framework and territorial organization were grounded in the 1978 Constitution. This text was sanctioned by the Cortes Generales, the Congress of Deputies and the Senate, on October 31 of that year. Approved by referendum on 6 December and finally sanctioned by the King on 27 December. Two modifications have been made in 1992 and 2011. These reforms were enacted solely by the decision of the Cortes Generales and the ratification of the monarch, bypassing the need for more complex mechanisms.

This constitution has two articles that are fundamental to understanding this work:

Article 1. The political form of the Spanish State is the parliamentary monarchy (Const. 1978).

And likewise:

Article 2. The Constitution is founded on the indissoluble unity of the Spanish nation, the common and indivisible fatherland of all Spaniards. It recognizes and

guarantees the right to autonomy of the nationalities and regions it comprises and the solidarity among them all (Const. 1978).

This system of regional organization is complex, as it is neither truly centralist nor entirely a federal system. Fundamentally, a significant distinction exists between the "non-historical" autonomies, which refer to those that had not reached the point of plebiscite on a statute of autonomy during the Second Republic. The regions considered historical include Catalonia, Galicia, and the Basque Country.

Historically, although the Basque Country (Euskadi) was part of the Kingdom of Navarre, and they share the same language and cultural traditions, politically they are two separate entities. The first, having a Statute signed in 1936, soon achieved the same with the return to democracy in 1979. Navarra, on the other hand, will only achieve its Statute of Autonomy years later, in 1982.

For this reason, this work analyzes the vote of migrant diasporas in the Autonomous Community<sup>3</sup> of Navarre, leaving the Basque Country for future study<sup>4</sup>.

Another point to consider is that the Autonomies maintain the Spanish parliamentary system and indirect voting by citizens. This means that the governing party is not necessarily the one with the most votes, as it may not secure a majority of the seats. Consequently, it must form coalitions and negotiate to achieve investiture.

## Autonomous Elections

To continue this analysis, it is essential to note that within the imposed time frame, there were four such elections in the Basque Country: October 21, 2012, September 25, 2016, April 5, 2020, and July 12, 2020. In the case of Navarre: 22 May 2011, 24 May 2015, 26 May 2019 and 28 May 2023 (Central Electoral Board, 2024).

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3 The term "Foral" pertains to jurisdictions, laws, and privileges that predate the formation of the Spanish State. Only Navarre, Álava, Bizkaia and Gipuzkoa (the last three belonging to the Basque Country) have this *status*.

4 Historically, the Kingdom of Navarre was a political entity that stood on two modern nation-states: Spain and France. In the latter country, Navarre is referred to as Baja Navarra and is part of the Atlantic Pyrenees department. This territorial administration does not align with what is known as the French Basque Country, the Northern or Continental Basque Country, or Iparralde in the Basque language. This is due to its entirely different situation compared to the Autonomous Community, and therefore it will not be considered in this work.

## Autonomous Elections in Navarre.

As previously mentioned, Spaniards abroad who wish to vote must register in the census (CERA). Although the exact composition of this census is unknown, it is known that the majority consists of Argentines with dual nationality. This is partly due to Argentina being the country that has received the largest number of immigrants in the world, leading to the largest diaspora. However, as shown in the table below, although the number of registered voters is relatively large, those who actually vote in these regional elections are very few.

**Table 1.** External voting (CERA) for the Parliament of Navarra in 2015 and 2019.

	2015	2019
<b>Census</b>	23156	27462
<b>Votes</b>	814	1028
<b>%</b>	3,5	3,7

Source: own elaboration based on data from the Central Electoral Board.

Next, an analysis will be conducted on the most voted political parties in these elections:

**Table 2.** Parties Voted in 2015.

<b>Party</b>	<b>Votes</b>
UPN	168
PP	86
PSOE	94
GEROA-BAI	76
BILDU	132
PODEMOS	148
COALICION I-E	0

Source: own elaboration based on data from the Central Electoral Board.

The UPN (Unión del Pueblo Navarro) is a regional, center-right party founded in 1979, characterized by its "Navarrista" stance. This implies a differentiation from traditional Basque nationalism. One of its objectives is to maintain the political differentiation and separation of the two autonomies: its own and that of the Basque Country. Other parties, such as the Partido Popular (PP), Partido Socialista Obrero Español (PSOE) and PODEMOS, are parties with a national reach.

GEROA-BAI is also a political party in Navarre. They define themselves as progressive, center-left and is the union of the Socialverdes and the Partido Nacionalista Vasco (PNV). Nationalism also plays a strong role here, but in this case, it can be described as "Pan-Basqueism." Its president, Uxue Barkos, presided over the Government of Navarre between 2015-2019.

As for BILDU, it is a left-to-far-left coalition of the pro-sovereignty group that seeks independence from Spain. It is a controversial party, especially among right-wing sectors and groups of terrorism victims, due to its association with ETA and having convicted members of this group as candidates. However, in the last elections in Navarre it was the third most voted political force. The mayor of its capital -along with other municipalities- belongs to this group.

**Table 3.** *Parties voted in 2019.*

Party	Votes
UPN	0
PP	0
PSOE	195
GEROA-BAI	146
BILDU	99
PODEMOS	102
COALICION I-E	32

Source: own elaboration based on data from the Central Electoral Board.

The I-E coalition, Izquierda-Ezkerra, was an alliance of Navarrese left-wing parties that lasted from 2011 to 2023, when it merged with Zurekin.

**Table 4.** *Parties Voted in 2023.*

Party	Votes
UPN	507
PP	405
PSN/PSOE	509
GEROA-BAI	189
EH BILDU	239
VOX	187
ZUREKIN	178

Source: own elaboration based on data from the Central Electoral Board.<sup>5</sup>

There were 32 blank votes and 13 void votes; only for these elections are blank or void votes available.

The coalition for this vote incorporates Zurekin as a broad left front. It is a regional force that is created to fight in the elections to the Navarrese parliament.

Below are the results, taking into account the percentage of voter turnout from the last elections:

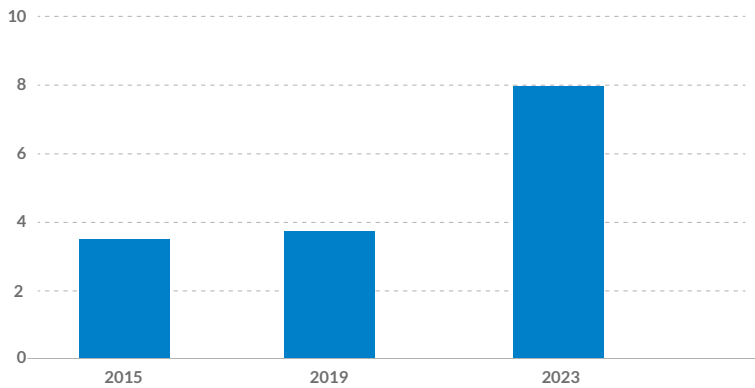
**Table 5.** *Percentage of voters.*

2015	2019	2023
3,5	3,7	7,94

Expressed graphically:

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<sup>5</sup> Other minority parties with fewer than 100 votes each include: For a Fairer World, Ciudadanos, Euguzkilore (a flower in Basque mythology believed to protect the home), and Voluntad Foral.



**Figure 2.** *Percentage of voters.*

As shown, there is a significant increase in the number of voters on the census. This increase is due to the legislative change that facilitated the practical aspects of the election, transitioning from *Organic Law 2/2011*, which used the concept of the "begged vote," to *Organic Law 12/2022*, as previously mentioned.

Thus, the system of parties and coalitions in Spain in general and, in Navarre in particular, is very complex. On the one hand, some denominations are changing in the same way as the alliances that are interwoven. On the other hand, the issue of strong national identities is a cross-cutting matter that significantly influences and extends to diasporas.

If we consider all the variables of political parties with some level of nationalism in their platforms, such as Geroa Bai and EH Bildu (noting their significant differences), the percentage of votes from the diaspora is always relatively significant, given the parliamentary system. If it were a presidential system, as in American countries, this data would be negligible. This can be noted in the following table<sup>6</sup>:

**Table 6.** *Percentage of Nationalist Parties.*

2015	2019	2023
25,5%	23,8%	12,89%

<sup>6</sup> The subject of Basque nationalism is very complex, to go deeper into the subject: Pablo et al. (2001). *El Péndulo Patriótico*.

For the complex issue of party alliances in Navarre: Caspistegui (2021), *El Laberinto de la representación: Partidos y cultura política en el País Vasco y Navarra (1875-2020)*.

This can have several interpretations. One might consider it a more sophisticated vote, seeking or accessing information beyond what is typically found in the mass media, which primarily refers to national parties. On the other hand, while not exclusively explaining the previous point, it complements it to some extent. The people who vote in regional elections mostly belong to diasporas organized in community institutions.

Although the Basque Centres are, by definition, apolitical, this does not imply that their members are apolitical. They can provide information that may also serve as political proselytism.

Another factor to consider is the regional diversity of Basque immigration, particularly in Argentina, where community centres were distinguished by the immigrants' places of origin. Very early on, the Navarrese distinguished themselves from the Basques by founding their own centre in Buenos Aires in 1895. Later, they were also founded in Rosario in 1913, Mar del Plata in 1942, and finally, in Mendoza and Bolívar in the province of Buenos Aires. These centers form a Federation, and it is estimated that there are around 40,000 natives and descendants of Navarre in Argentina. These centers receive annual financial aid from the Government of Navarre to support their operations.

## 2011 Elections.

The introduction proposes 2011 as a significant starting point for this analysis, marking the moment when the terrorist organization Euskadi Ta Askatasuna (ETA) unilaterally ceased its armed activities. This occurred on October 20 of that year. However, when measuring this fact electorally, it is not possible for the regional elections in Navarre, as they took place earlier that year, on May 22.

Nevertheless, to evaluate this significant event from a political perspective and its impact on the country's peaceful coexistence, below are some data and results of the vote from abroad for the general elections that took place in November.

**Table 7.** *Parties voted in 2011, in percentages.*

Party	Votes
UPN-PP	51%
PSN-PSOE	33%
AMAIUR	9,48%

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GEROA-BAI	6,41 %
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Source: own elaboration based on data from the Central Electoral Board.

It could be said that in this election, particularly for Navarrese abroad, national distinctive identification was more significant. Understood, in this particular case, as something that pertains to the cultural aspect.

Although it is beyond the scope of this work to define all the political coalitions and parties that are emerging and disappearing, it is relevant to briefly mention AMAIUR. This left-wing sovereign coalition was established with the aim of defending the national interests of the Basque Country and Navarre in the National Congress. In this case, the votes from abroad and those from the peninsula coincide, with AMAIUR coming third in Navarra in both. This group of parties advocated for the "Gernika Agreement," a proposal by the *abertzale* left<sup>7</sup> requesting ETA to cease its activities (the organization had already proposed a ceasefire on September 5, 2010) and urging the government to repeal the *Political Parties Act of 2002*, which banned groups perceived to be close to ETA. This led many of these outlawed parties to rename themselves or form new coalitions to evade this regulation.

This situation complicates voting for both local and overseas voters. Additionally, at that time, it hindered a negotiated solution to the conflict by preventing the existence of an interlocutor to serve as a negotiator, similar to what happened in Northern Ireland with Sinn Féin (Cruset, 2011a).

## Conclusions

Often, votes from abroad are evaluated negatively because they are assumed to be uninformed, leading to criticism and belittlement. However, in many cases, the information they receive to vote comes from alternative sources. In cases where the press faces censorship or self-censorship, citizens abroad can bypass it by using alternative channels, such as international news agencies or more informal media like direct contact with family, friends, and co-religionists who reside in the area. Therefore, instead of underestimating this vote, it should be valued as enriching for providing a different perspective, and considered complementary and beneficial.

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7 "Patriota" in Basque.



In the case of voters from abroad in the Navarrese regional elections, their participation has not been numerous or defining. However, it has been growing due to the Spanish state's legislation on the matter and the efforts of political parties to raise awareness and mobilize members of the diaspora. As participation increases and becomes more significant, interest in the external vote will also grow, creating a virtuous cycle that benefits everyone. As the diaspora gains more influence, various political groups will incorporate some of their objectives into their agendas and electoral platforms to secure their support. Subsequently, the State will follow suit. This has been seen and studied for other national cases, and has always been for the better in all of them. Citizens within the national territory and those in the diasporas are two sides of the same coin. Their efficiency increases the more coordinated they become. Those abroad and those at home need to collaborate to create the best outcomes for everyone, striving for the common good.

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# Political Philosophy and Migration: Contemporary Debates Within the Framework of Methodological Nationalism\*

[English version]

Filosofía política y migración: debates contemporáneos  
en el marco del nacionalismo metodológico

Filosofia política e migração: debates contemporâneos  
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Colombia

## Abstract

This article examines three of the most prolific debates (due to their abundant academic production) within contemporary philosophy on migration: the dichotomy of closing or opening borders, the expansion of the conception of justice and, briefly and introductory, the ethics of migration. **Objective:** The objective is to show how these debates are articulated with the conceptual tendency of methodological nationalism, both in its structuring and in the attempts to overcome its consequences. **Methodology:** A literature review was carried out on the responses of the different schools of philosophical thought -namely, communitarian,

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nationalist and liberal cosmopolitan- to the huge migratory flows. **Results:** The literature reviewed maintains the figure of the State as the only recognized actor to morally validate the management of human mobility. **Conclusions:** Methodological nationalism has contributed to hiding the reality of the cross-border connections and processes that should guide theorists in the study of migration. Furthermore, to overcome the cognitive bias of methodological nationalism, the incorporation of approaches from the social sciences is proposed, in order to better address the conceptual and ethical challenges involved in human displacement.

**Keywords:** political philosophy; migration; methodological nationalism (obtained from the UNESCO thesaurus).

## Resumen

En este artículo se examinan tres de los debates más prolíficos (por su abundante producción académica) dentro de la filosofía contemporánea sobre migración: la dicotomía cierre o apertura de las fronteras, la ampliación de la concepción de la justicia y, de manera breve e introductoria, la ética de las migraciones. **Objetivo:** el objetivo es mostrar cómo estos debates se articulan con la tendencia conceptual del nacionalismo metodológico, tanto en su estructuración como en los intentos por superar sus secuelas. **Metodología:** se realizó una revisión documental sobre las respuestas de las diferentes escuelas de pensamiento filosófico —a saber, comunitaristas, nacionalistas y cosmopolitas de corte liberal— ante los ingentes flujos migratorios. **Resultados:** la literatura revisada mantiene la figura del Estado como el único actor reconocido para validar moralmente la gestión de la movilidad humana. **Conclusiones:** el nacionalismo metodológico ha contribuido a ocultar la realidad de las conexiones y procesos transfronterizos que deberían guiar a los teóricos en el estudio de la migración. Además, propone, para superar el sesgo cognitivo del nacionalismo metodológico, la incorporación de enfoques provenientes de las ciencias sociales, con el fin de abordar mejor los desafíos conceptuales y éticos implicados en los desplazamientos humanos.

**Palabras clave:** filosofía política; migración; nacionalismo metodológico (obtenidos del tesoro UNESCO).

## Resumo

Este artigo examina três dos debates mais prolíficos (pela abundante produção acadêmica) dentro da filosofia contemporânea sobre migração: a dicotomia entre fechamento e abertura das fronteiras, a ampliação da concepção de justiça e, de maneira breve e introdutória, a ética das migrações. **Objetivo:** O objetivo é mostrar como esses debates se articulam com a tendência conceitual do nacionalismo metodológico, tanto em sua estruturação quanto nos esforços para superar suas consequências.

**Metodologia:** Foi realizada uma revisão documental sobre as respostas das diferentes escolas de pensamento filosófico — a saber, comunitaristas, nacionalistas e cosmopolitas de orientação liberal — diante dos intensos fluxos migratórios. **Resultados:** A literatura revisada mantém a figura do Estado como o único ator reconhecido para validar moralmente a gestão da mobilidade humana. **Conclusões:** O nacionalismo metodológico tem contribuído para ocultar a realidade das conexões e dos processos transfronteiriços que deveriam orientar os teóricos no estudo da migração. Além disso, propõe, como forma de superar o viés cognitivo do nacionalismo metodológico, a incorporação de abordagens das ciências sociais, a fim de melhor enfrentar os desafios conceituais e éticos envolvidos nos deslocamentos humanos.

**Palavras-chave:** filosofia política; migração; nacionalismo metodológico (obtidos do tesouro UNESCO).

## Introduction

Scholars Andreas Wimmer and Nina Glick Schiller (2003) are considered pioneers in the critique of methodological nationalism, a conceptual and analytical trend that has profoundly marked the development of social sciences, especially by challenging the reductionism that dominated studies on international migration for more than a century. According to the authors: “methodological nationalism is the naturalization of the global regime of nation-states by the social sciences” (p. 576). This approach, deeply rooted in the academic tradition, tends to interpret migration from a perspective that places the nation-state as the sole and primary framework of analysis, which limits the possibilities of understanding the transnational dynamics underlying migratory movements.

The influence of this paradigm has not been limited to the social sciences alone, but has also reached philosophical studies on migration. Although the migration phenomenon has been relatively recent in this latter field (without systematic developments in this regard), the conceptions derived from methodological nationalism have deeply shaped the scarce reflections on international mobility (Sager, 2021). This cognitive bias has given rise to a series of categorizations that, although challenged, continue to permeate reflection on migration (Velasco, 2010). The vision of homogeneous societies, delimited by borders, has marked the agenda of a lot of political philosophy, leading to the consideration of the international mobility of people as an exceptional or anomalous condition, which, although it does not affect theory, must be eradicated in practice (Loewe, 2009). Philosophical debates have thus oscillated between ignoring the phenomenon or reinforcing a State-centric bias that has clearly lost its validity in the face of new migration challenges: the intensification of border measures and management, the creation of binational containment spaces where migrants in transit suffer serious violations of their human rights, and the instrumentalization of asylum regimes to guide the selectivity of asylum seekers.

Sager (2017) argues that these neglects are due to the remarkable slowness with which political philosophy has assimilated empirical literature, that is, how migration phenomena are presented and developed in the real world through direct observation, data analysis, or field studies. However, this does not imply that the few philosophical debates on migration lack significance. In fact, they turn out to be valuable insofar as they question the theoretical and practical validity of the concepts, tensions and assumptions that underpin not only the discipline, but also the foundations of contemporary forms of social and political organization.

In this sense, reflecting on *migration* means rethinking the State and at the same time questioning the conceptual system that political philosophy has built over the centuries. The problematic aspect of the matter is that, instead

of questioning, most philosophical theorists have chosen to prop up fences and barriers that further legitimize the taxonomies imposed by States in their desire to ensure conceptual consistency and maintain a concentric order (Di Cesare, 2020).

It follows from the above that the debates that currently enjoy greater acceptance in political philosophy respond to the structures that arise from the strict logic of the national. At the same time, new theoretical-normative horizons emerge, albeit timidly, that point to the transformation or overcoming of this logic (Nail, 2015). At this point, it is important to highlight that overcoming the conceptual scheme of methodological nationalism is compatible with the position that the nation-state is and will continue to be the dominant institution in the international sphere (Beck & Sznaider, 2006; Chernilo, 2011; Sager, 2016).

The article reconstructs the debates raised by contemporary political philosophy, appealing to the theoretical-argumentative structures that arise in response to the migration phenomenon. To this end, the article examines how methodological nationalism has shaped the most prolific discussions. It is divided into three parts: the first deals with the debates that comprise the dilemma of closing or opening borders, which is at the heart of liberal theory and democracies; the second part addresses the discussions on migration that take place from the cosmopolitan perspective of justice; finally, the third part briefly addresses the interest in overcoming the consequences of methodological nationalism within the debates on the ethics of migration.

### **The Constitutive Dilemma of Liberal Theory. The Debates Over the Closing or Opening of Borders**

The justification for the closing or opening of borders is perhaps one of the most intense debates in the Anglo-Saxon and German contexts, and it is the one that best captures the effects of the state-centric model on the understanding of human mobility (Di Cesare, 2020; Sager, 2017). This debate brings back not only a tension but a direct contradiction between two fundamental premises of liberal theories: on the one hand, the universalist postulates championing respect for human rights and freedom of movement; on the other, sovereign self-determination that restricts the space of the obligations of justice to that circumscribed by the borders of States (Benhabib, 2005; Loewe, 2020). At this point, the center of the controversy, rather than in the abolition of political borders, is the question of the state-centric model, which is based on the principle of the state-centric model – where the dilemma takes shape – is placed in the control that should be exercised over these for the passage of human beings



(Velasco, 2012). The responses raised confront fundamental moral questions and assumptions in political, economic and democratic spheres that are supported by the claims and rights of those who request admission with the concerns of governments and citizens to control the quality and quantity of those who are admitted (Abizadeh, 2008; Weiner, 1996).

While this is happening, the discussions –which in theory have adopted liberal nationalist, communitarian or statist positions– have had, even in a pragmatic way, realistic institutional effects, since they tacitly indicate the guidelines of the current exclusion policies (Zapata-Barrero, 2012). By virtue of the above, borders have become the cornerstone of state-centrism, shaping the criteria of belonging (“inside”/“outside,” “members”/“foreigners,” “permanent”/“temporary,” “legal”/“illegal”) that configure and condition the modern political space, while materializing the processes of segregation on a global scale (Velasco, 2022). The unilateral right of states to control their borders, in conjunction with birthright citizenship, plays a decisive role both in determining who belongs or not to a political community and in conditioning – by way of stratification – the life opportunities of individuals and thus reproducing structural and historical injustices on the global political stage (Owen, 2020; Solanes, 2016).

The point is that for a little over three decades, philosophical debates on migration have had as their epicenter the role played by borders in establishing on a normative level what constitutes a just order (it should be noted that, at the time, this was not even a topic of discussion for legal and political theories) (Bosniak, 2006). To this extent, political philosophy has focused on the reasons that articulate both the arguments in favor of maintaining an open border policy—which is based on the recognition of the existence of global responsibilities in a context of inequalities between countries— and the criteria of migratory selectivity that safeguard the security, political culture and stability of the economic systems of political entities (Wellman & Cole, 2011). At the level of normative theory, the positions between the sides (that is, whether borders should remain open or closed) represent a broad scenario of academic discussion among theorists who make up the schools of political philosophy: libertarians, utilitarians, communitarians and liberal nationalists, whose analytical frameworks are governed and reproduced in the strict logic of the national.

Within this diverse group of theoretical schools, John Rawls has been a starting point for both later developments and for questioning many fundamental assumptions of his own theory. In relation to the dominant tradition in Anglo-Saxon political philosophy—taken up by the European and, especially, the German academy—the resource of a closed society, in the strict Rawlsian sense, provided a frame of reference to reason about justice and to establish the State as its unit of analysis (Di Cesare, 2020). According to Rawls (1999), the

pressure to emigrate is an anomalous condition, which can only indicate that people have not adequately taken care of its internal policy, hence it does not contemplate the migratory phenomenon beyond discarding it. In his view, the responsibilities for this neglect cannot be transferred to other societies that have managed to regulate their collective life fairly. At most, these might have a duty of assistance toward disadvantaged societies, helping them to become decent peoples. In a society of liberal and decent peoples, following a realistic utopia (absence of wars, persecutions, famines, oppression and inequality), the problem of immigration would be practically non-existent. Starting from this omission, Joseph Carens, “radicalizing Rawls’s intentions against Rawls himself”, carries out pioneering work by drawing different conclusions from the Rawlsian premises and, in particular, from the “original position” (“veil of ignorance”) “to think in depth about the principles of justice from the point of view of the refugee, the immigrant and the asylum seeker” (Benhabib, 2005, p. 76).

Carens (1987) argues that while principles of justice need to be thought of within the confines of a closed society, they should be extended and applied universally to different societies. To support his reasoning, he applies the device of the “veil of ignorance” —which limits the knowledge available when choosing principles of justice— to make an argument in favor of open borders, since there is little justification for restricting immigration. Simply considering it as one more right in the system of basic liberties could be essential to improve the conditions of the most disadvantaged.

At this point, Carens (1987) stresses that the circumstances of birth are undeserved —being born in a peaceful, democratic and prosperous country or in a poor, authoritarian one with serious civil conflicts— but at the same time they are determinants of what individuals can achieve in life. So, if the “original position” of the Rawlsian theory of justice is to be considered, it would have to minimize the effects of such contingencies on the distribution of social benefits. Thus, “open borders would allow those born in disadvantaged countries to improve their position by moving to a place where they would have greater opportunities” (Weiner, 1996, p. 174).

Zolberg (2012) points out that Carens’ position in favor of open borders —one that he maintains in later publications (Carens, 1987; 1988)— is not a realist position, but rather a guide for politics in order to question the “status quo” of a world divided into mutually exclusive national communities. Furthermore, that the rise of writings on migration in political philosophy over the last three decades is largely due to these questions is worth highlighting, as the topic had been overlooked by other political theorists and philosophers who took for granted state discretion in migrant admission policies (Di Cesare, 2020).

Carens' perspective lies not so much in the defense of open borders (strongly contested), but in the way in which it gave rise to a previously neglected area of research with radical consequences (Sager, 2017). Among these consequences, Zapata-Barrero (2012) highlights “the inconsistencies between the reality of border control and a liberal tradition that has difficulty justifying the very existence of borders and their function of exclusion and control” (p. 42). Nevertheless, there are those who find great injustices in the argument—which some consider cosmopolitan—that suggests that borders should remain open.

Michael Walzer is one of the theorists who best captures these debates, which are part of what can henceforth be considered a common response pattern among communitarian theorists, although it can also be identified with some variations within liberal nationalists. Amongst them, “important concerns are raised regarding the need for democratic self-government and the legitimacy of borders” (Benhabib, 2005, p. 88). Walzer (1983) introduces his reflection on membership—based on critical and democratic principles of a communitarian nature—into theories of justice and debates on migration. The concept is the most invoked by immigration scholars to normatively justify the closing of borders. It must be noted that communitarianism, in which some of the most prominent exponents, Michael Sandel, Charles Taylor, and Walzer (who do not call themselves communitarians), arises as a reaction to the work *A Theory of Rawls's Justice*, as well as Rawlsian universalism, offering an alternative position that considers the particularisms of communities (Misseri, 2019).

In his argument, Walzer identifies an *asymmetry* between “emigration” (recognized as a human right) and “immigration” (recognized as a state issue or prerogative) to establish differences between *members* of a political community and *strangers*. From this reasoning it follows that states have the power to welcome foreigners in a limited way and that the criteria for their admission, control and restriction must be established collectively by its members, in accordance with the vision of justice that they have already built in the political culture (values, norms and traditions) of the community they wish to have. To this extent, Walzer understands that a state is a community of members who, by their primacy as citizens, have the right to shape it according to their own interests (backed by cultural homogeneity), which enables them to control its borders and establish admission policies for its preservation.

However, Walzer's position constitutes an unavoidable point in that it offers, in normative terms, a well-argued and complete sovereigntist perspective with repercussions in practical terms, indicating, albeit tacitly, the patterns of current exclusion policies (Di Cesare, 2020). Carens (1987) points out that Walzer's contribution represents a shift from Rawlsian questions of distributive justice addressed from a “veil of ignorance” to incorporate the perspective of belonging

to a political community (citizenship), in which people share the same culture and a common understanding of justice. In practical terms, as Bosniak (2006) argues, Walzer's analytical account of "membership" broadly corresponds to the body of US immigration laws that regulate both the admission and exclusion of foreigners, and thus turns out to be a frame of reference for understanding its complexities.

It is worth noting that, in the practice of liberal democracies, issues associated with borders are resolved through references to the principles of nationality. In this sense, Walzer's thesis has served as a hinge, allowing other theorists to consider the self-determination of the political community as an argument for closing borders and rejecting immigrants. Thus, the discretionary power of States through citizenship in matters of immigration is adopted by political philosophers such as Christopher Heath Wellman (2008), and liberal nationalists such as David Miller (1995) and Will Kymlicka (1995) to justify closing borders and the limits of the obligations of justice.

Wellman's (2008) argument is similar to Walzer's in that it considers that national communities have the right to create policies to admit, control and sometimes restrict the flow of immigrants. However, Wellman distances himself from him in this respect: what leads members of a community to restrict political membership is not a matter of preserving a particular culture, but their right to association. "Wellman concludes that just as an individual has the right to determine with whom he would like to associate, a group of fellow citizens has the right to determine whom they would like to invite into their political community" (Wellman & Cole, 2011, p. 2). From this it follows that freedom of association brings with it the right to exclude. According to Wellman, this inference alone would be sufficient to dismantle the aforementioned tension between universalist postulates and sovereigntist institutionalizations with respect to immigration: "it would be a universal liberal principle (freedom of association) that would grant states the power to exclude immigrants at their discretion" (Loewe, 2020, p. 194).

Miller (1995), who is considered a "weak" cosmopolitanism, also argues in favor of closing borders. According to this author, it is not possible for the interests of foreigners to count as much as those of citizens, an idea that is contrary to the premises of a "strong" cosmopolitanism, which grants equal value to individuals regardless of the nation to which they belong. Miller's nationalist defense of closing and controlling borders is accompanied by a series of arguments that have varied over time: admission priorities among different categories of migrants, overpopulation and the refusal of developing countries to "export" their surplus population to the rest of the world (Miller, 2015; 2004).

These arguments are especially controversial in the context of recognition and special treatment for refugees. Like Walzer and other philosophers, Miller defends the thesis that links the self-determination of the community of destination with the right of citizens to prioritize and maintain the “composition of the civic body” over immigrants. In relation to these, the government of a nation-state would be, at best, obliged to weigh and evaluate the reasons they present to justify their entry and offer a response (Bravo, 2021). However, this does not necessarily imply their entry, but refers to a series of justifications to legitimize the interests of the state and its citizens, which must prevail over the wishes of those seeking entry, to support the immigration policy adopted (Bravo, 2021).

Following Miller’s line, Kymlicka (1995) also leans in favor of state control of borders by virtue of the existence of certain shared values (a common language). However, unlike other nationalists, he does not promote the defense of a single national identity, since he advocates the consideration of minorities as “full citizens whose interests must be duly considered and not weighed on the basis of how they will affect the dominant national group” (Kymlicka, 2001, p. 262). This consideration plays an important role in his theory, since it establishes differences between minorities—who can legitimately demand self-government rights—and migrants, who can claim rights that facilitate their integration into the host societal culture (Loewe, 2019). Regarding immigration, Kymlicka (2001) maintains that the goal would be to guarantee that all people can live a dignified life in their respective countries of birth, without having to leave their culture. For this to be possible, rich countries would have to be willing to share their wealth and thereby acquire the right to restrict admissions through their borders. If states were to comply with these obligations of international justice, they would be allowed to regulate admissions in order to preserve the national community.

So far, none of the mentioned political philosophers considers that foreigners have the right to be admitted into a state; in other words, none of them are in favor of opening borders. With this panorama of political philosophy, as has been suggested, not only has there been an attempt to generate a normative tendency that supports a particular vision of borders in the face of immigration, but essential definitions have also been proposed that guide the law and selectivity in contemporary immigration practices and policies.

However, increasingly transnational spaces and the emergence of global actors and forces challenge the state-centric paradigmatic conception in multiple ways. This has implied, among other things, the questioning of the basic categories of contemporary forms of organization, as well as the emergence of other analytical and discussion frameworks, which, without denying the importance of national States, deal with the restrictions imposed on the configuration of

citizenship, the limits of belonging and the scope of justice in migration contexts; which will continue to be explained.

## Cosmopolitanism: Debates on the Scope of Global Justice

Just like the chapter on membership in Michael Walzer's *Spheres of Justice* was a starting point for immigration-skeptics and border-closing scholars, Joseph Carens' *Aliens and Citizens: The Case for Open Borders* was also a starting point for cosmopolitans (Seglow, 2005). Clearly, since then, the moral argument in favor of free movement across open borders has been oriented extensively toward a regime of global justice and expanded conceptions of citizenship and democratic theory whose boundaries no longer fit with the borders of nation states (Abizadeh, 2008). It is worth noting that conceptions of global justice —within the cosmopolitan paradigm— do not imply open borders in immigration matters, which is why the need to eliminate the causes of forced migration is frequently argued (Taraborrelli, 2022). In this way, a series of arguments can be found, such as the allocation of resources to counteract global inequalities (Pogge, 2001) and distributive justice (Fraser, 2007; Shachar, 2009), articulated with new forms of political membership (Bauböck, 2009; Benhabib, 2005).

On the one hand, while issues of justice have always remained on the agenda of political philosophy since Hobbes —and given the revitalizing character that the introduction of Rawls's domestic approach meant— the changes grouped under the label of globalization have forced an expansion of its frame of reference (Risse, 2012). On the other hand, the problems associated with methodological nationalism have become increasingly evident, as the assumptions of nations based on fixed communities (territories) that share language, culture, and history become unsustainable. As Ulrich Beck (2007) points out, one of the most pressing needs of contemporary times in the study of social processes is to break down social and state borders around the static figure of the national state.

This should not be confused with the thesis that supports the end of nation-states, but it can be taken as a decisive point in the face of the increase in interdependence between social actors across national borders, which can only be observed from a cosmopolitan approach (Beck & Sznaider, 2006). To incorporate this new perspective, Beck and Sznaider (2006) consider that it is necessary to break away from utopian notions anchored to moral ideals about the existence of a global citizenship —so familiar to philosophers since ancient times— in order to conceptualize a set of dynamics, identities, social spaces, situations and processes, whose impacts are real and not reducible to the national spectrum.

This transition has been, at least partially, consistent with the questions that cosmopolitan philosophers have raised regarding the deontological arguments in favor of open borders. Along these lines, contemporary debates on migration have proposed the establishment of redistributive principles as a measure to reduce people's incentives to leave their communities of origin. This, in concrete terms, aligns with contemporary development aid schemes based on conditionality (León, 2024). For Sager (2016), although these positions recognize certain global dynamics, they reproduce the bias of methodological nationalism by conceiving migration as a response to abnormal situations, such as poverty or persecution, insisting that the desire to migrate would disappear completely once such circumstances were addressed. This assumption has contributed to supporting the idea of a supposed balance between migration and development; that is, development aid could be offered instead of granting visas (Cavallero, 2006; Kymlicka, 2001; Wellman & Cole, 2011).

There are even those, such as Brock (2010), who argue that even considering the removal of immigration restrictions (without taking any or sufficient measures to improve the life prospects of the countries where people want to migrate) may constitute a step backward in matters of justice. From this perspective, state borders are configured in at least two ways: 1) concentrating opportunities in some countries while limiting them in others, and 2) preventing individuals from less advantaged societies from having access to the opportunities available in more prosperous societies (Cavallero, 2006). Thus, it is assumed that the more advantaged countries that are under pressure from immigration are responsible for remedying the inequalities of those that generate such pressure.

Pogge's (2001) position is perhaps one of the most representative, considering that inequalities in access to wealth and life opportunities are the result of systemic factors inscribed in the global economic order, such that the establishment of redistributive criteria—such as compensatory duties—would eliminate not only poverty, but also the incentives of the most disadvantaged to migrate. His thesis responds to a list of reasons to justify that the opening of borders would be ineffective against poverty to the extent that, if applicable, the number of people that a country can admit would be tiny compared to the number of people desperate to immigrate, and that the establishment of a generous admission policy would free governments from responsibility to deal with the endogenous causes (corruption, incapacity, political culture) that affect and expel their populations (Taraborrelli, 2022).

For Peter Singer (1995), the argument in favor of distributive obligations—unlike Pogge—has nothing to do with the obligations of compensation for externalities arising from the organization of the international context. From his

position as a utilitarian cosmopolitan, the moral duty to help one's fellow human beings in difficulty wherever they may be, prevails. Consequently, it follows that it is possible to provide assistance to the most disadvantaged occasionally, which in no case implies giving the green light to immigration.

Singer (1995) disagrees with those who advocate a world of open borders when analyzing the situation and treatment of refugees. For him, the "status quo" privileges the political interest and convenience of national systems. Although rich countries have a moral responsibility to help those who have been forced to flee their communities due to war, political persecution, violence or climate change, the admission of those most in need is seen as a mere "*ex gratia act*". In this sense, refugees will not be admitted until the point where the negative effects on residents outweigh the positive.

Another position that tends to consider the issue of open borders in terms of utility, but to the extreme of making cosmopolitanism compatible with liberal nationalism, is that of Brock (2010). For this author, the assumption that a cosmopolitan must be in favor of open borders —or more open— and against immigration restrictions —in an ideal theory— is recurrent. However, this is not always the most appropriate, since this type of position regarding migratory flows can be much more inconvenient for the most disadvantaged countries, among other things, because it can considerably worsen the situation of the people who reside there and cover up the failure of some governments to guarantee decent living conditions for their populations (if it is assumed that migrations are an exclusive matter of international institutions). While Brock's position reflects the need for global institutions, it also calls for international interventions (political, economic or military) if necessary, which can put pressure on the governments of the sending and less favored states to make changes that would be much more effective in combating poverty, rather than adopting measures to relax immigration policies on behalf of the host states.

Each of the above-mentioned philosophers advocates the transformation of institutions at a global level and suggests the development of distribution mechanisms that regulate economic and social inequalities in states, reducing the causes of migration to poverty. For Kukathas (2016), this theoretical discussion on distribution has failed in the case of refugees, since wealth transfers cannot help those whose suffering is rooted in the collapse of institutions in their countries of origin. "Refugees represent exceptional cases for which help can be provided not by a transfer of funds, but through emigration" (Kukathas, 2016, p. 264). In this way, this type of argument transforms the right to migrate, moving from being a subsidiary aspect – for those who advocate distributive principles – to occupying a central position, to the extent that "immigration is accepted as an effective mechanism to achieve the ends of global justice" (Loewe, 2012, p. 484).



Along these lines, Whelan (1992) and Wilcox (2009) argue that prosperous liberal democratic societies are morally obliged to admit needy immigrants as a partial response to global injustices such as poverty and human rights violations, which does not constitute a defense of the right to freedom of international movement *per se*. In particular, Whelan is averse to traditional aid coming from those who defend distributive principles, represented by direct transfers of aid (both material and technological or in the implementation of international taxation schemes). This stance is due to the frequent inefficiency of such methods, which are often affected by poor management or by the misappropriation of funds by unscrupulous individuals. Instead, Whelan opts to promote immigration opportunities that would directly benefit the people who take advantage of them.

Wilcox's (2009) position, on the other hand, focuses on the obligations of liberal democratic states to compensate victims of human rights violations through resettlement. To illustrate, Wilcox uses the situation of an army that has damaged the infrastructure of another country and that causes its civilian population to suffer from food and medical shortages. In this case, following his argument, if the damage cannot be repaired before more violations of the human rights of these people occur, then the responsible society must offer them admission as immigrants.

In another instance, Owen (2021) draws a distinction between global justice in migration and through migration. For this author, the approach that has prevailed is based on the right of people to participate in transnational migration or on the state right to control it, when in reality migration is an instrument to achieve or accomplish other ends. Owen alludes to the migration of qualified professionals (brain drain) as an individual matter where people pursue their own conception of the good life, but also of justice from the perspective of less developed states that benefit from remittances. Specifically, this has been a topic of philosophical debate (of limited normative interest) on which some theorists (Brock & Blake, 2015; Ypi, 2008) show concern about the distributive effects of this type of migration for the countries of origin. The fear is based on the belief that skilled workers are the people most likely to build and sustain governments, schools, hospitals, and businesses that promote development in poor countries; hence the direct response is to prevent their emigration so as not to jeopardize their development prospects (Sager, 2014).

Broadly speaking, there is a tendency in these positions to shift issues of justice to the sending communities, within the framework of methodological nationalism, in order to establish not only duties to compatriots in relation to the restriction of emigration, but also compelling arguments for adopting some restrictions on immigration. This is problematic, since the discussion ignores

the responsibilities of global institutions and policies that systematically shape migration and unfairly disadvantage many societies around the world.

## **The Ethics of Migration and its Debates**

The anomalous and exceptional nature of the treatment of international migration from a political perspective has restricted the debate to a supposed dichotomy between open and closed borders, often between nationalists and cosmopolitans, which rests on the conceptual framework that delimits the nation state (Sager, 2016; 2017; 2021). For both sides of the debate, states—in a logic between senders and receivers, sometimes described as poor, rich, deteriorating or well-governed—are considered the main actors that act in accordance with their right to exclude potential immigrants, who are conceptualized as abstract bearers of human rights, and who are distinguished from each other only by the status granted to them by borders: refugees or economic migrants (Jaggar, 2020).

Despite the unsustainability of such a vision, it is assumed that humanity is divided into a limited number of nations whose borders serve as a stronghold to safeguard political communities that share culture, history and, probably, language and physical appearance (Glick et al., 2006). Added to this is the tendency of political theory of migration to be directed toward Western, liberal and democratic societies. Importantly, the main categories of analysis that political philosophy employs to theorize human mobility, including political authority, legitimacy, democracy, sovereignty, and distributive justice, have emerged during centuries of nation-building, leaving it ill-equipped (intentionally or not) to understand the complexities of social and political life in the contemporary world (Sager, 2021).

For Jaggar (2020), philosophers certainly recognize that the real world operates outside the kind of abstractions they use to represent their basic reasoning schemes. However, as Sager (2021) argues, political philosophy has used these assumptions to promote and legitimize nationalist and statist ideologies from which it has benefited, since its most prominent theorists understand that what is at stake goes beyond academic debates. Indeed, with their actions, researchers and scholars of migration are inscribed “in the same sociopolitical processes and struggles through which the ‘national’ configuration of ‘society’ (or the social field) is reified and actualized as a territorial expression of state power” (De Genova, 2013, p. 251).

It is no coincidence then that the questions raised about migration and mobility revolve around the ways of governing and regulating migrant “flows” while a

fruitful philosophical production focuses on legitimizing, from the perspective of the state, the exclusion of newcomers to the territory (Boudou, 2021; Di Cesare, 2020). From there, the dominant discourse maintains that migrations represent a tragedy for welfare states and a threat to the values, integrity, and security of the most prosperous communities, which “is aggravated by academic funding regimes, both national and philanthropic, which have fueled the understanding of certain types of human mobility as a ‘problem’ to be solved” (Anderson, 2019, p. 3).

Little or nothing is said about the conditions of production and reproduction of migration (emigration-immigration) or the ways and conditions of entry of migrants into the destination country, which include countless obstacles: border devices, bureaucratic obstacles, long stays in refugee camps or immigrant centers with the purpose of discouraging their entry (Niño, 2022; León, 2024). The conversation is exclusively about the context in which the settlement processes (immigration) take place; that is, the processes to try to become a member of a new state in a unidirectional sense (from poor countries to rich ones). This contrasts with the little or no interest in emigration, which only comes into play in relation to discussions about brain drain (Sager, 2017). The preponderance of some issues over others would therefore be the most evident proof of the pernicious effects of the “state-centric myopia” that provokes methodological nationalism (Llopis, 2007). The consideration of the State —a fixed, autonomous and sovereign society— as a “natural” framework for analysis supposes a “territorial trap” that can only be sustained from certain control strategies based on which the political community, authority, and justice are conceived within state borders (Agnew, 1994).

Cosmopolitans, who are not immune to the bias of methodological nationalism, recognize the need for a methodological shift, given the emergence of new social dynamics and actors outside national borders. Their discussions of global justice structure and accept the terms of the debate established by the assumptions provided by this approach, namely, a basic structure of society that implies thinking about the extension of domestic standards of justice on a global scale, and the existence of moral duties or special obligations that assume distinctions between compatriots and other human beings who do not share the same state affiliation. Even the paradigm remains intact when some theorists argue that the project of cosmopolitan justice can and should be achieved through reforming the state system, rather than projecting new post-national laws or simply questioning the epistemic assumptions about politics, society, belonging, territory, and sovereignty, which lead to discussions of migration in the contexts of nation-building or in an international framework of autonomous and sovereign states.

All this marks a breaking point between two types of debate on migration in contemporary political philosophy: one on “the ethics of immigration” —which has been developing here until now— and another in what is called “ethics of migrations” or “ethics of mobility”. The latter is not a proper field of philosophy, since it has been constituted independently since the 1980s. However, renewing the normative approach of political philosophy written mainly from the perspective of a host state that evaluates the claims of immigrants (Boudou, 2021) is proposed.

Amy Reed-Sandoval (2016) delineates this transition in terms of a shift in methodological and argumentative perspective between the Classical Open Borders Debate and the New Open Borders Debate. With this classification, Reed-Sandoval (2016) does not refer to an old philosophy of immigration, but structures a series of recent works that show a pattern of response on mobility and migration within contemporary political philosophy. The new debate introduces a considerable complexity of normative discussions, not only on mobility across state borders (as the classical debate usually portrays), but also on that which takes place within states and that which occurs to and from cities, as a consequence of the processes of urbanization, gentrification and destruction of peasant economies, among others.

The ethics of migration proposes escaping from methodological nationalism by questioning the uncritical stance that involves academics in the processes of building the nation-state, while promoting the incorporation of analytical approaches and methodologies that do not neglect nor distort the conceptual, ethical and theoretical challenges regarding human mobility (Anderson, 2019). This emerging area of normative study of migration aims to overcome the unidisciplinary myopia that has prevailed in political philosophy, facilitating a dialogue between it and the social sciences.

Although it must be acknowledged that political philosophy has remained relatively disconnected from this type of discussion, recently the dialogue and commitment established with the social sciences has allowed it to recognize new perspectives, categories and resources aimed at thinking realistically about the type of debates that should be on the table today; as well as abandoning those discussions with a level of abstraction so broad that it has left aside the concrete experience of immigrants and the real practice of immigration and refugee policies (Sager, 2020).

## Conclusion

The critique of the nation-state as a natural form of society and the epicenter of the study of social processes has led political philosophy to uncritically accept the structural injustices imposed by the migration governance regime, which is restricted to the unilateral right to control borders, a narrative that its theorists have tried to legitimize for years. Broadening the approaches within the discipline, establishing a more fluid dialogue with the social sciences, would allow for formulating deeper questions and generating more fruitful debates about the nature and differentiated effects of migration processes on various communities, as well as their moral implications.

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# Citizenship and International Migration: Transnational Political Participation and the Peruvian Immigrant Vote, 1980-2024\*

[English version]

Ciudadanía y migraciones internacionales: participación política  
transnacional y voto de los inmigrantes peruanos, 1980-2024

Cidadania e migrações internacionais: participação política  
transnacional e voto dos imigrantes peruanos, 1980-2024

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## Abstract

**Objective:** To characterize the political participation of Peruvians abroad based on the review of official statistical data and empirical studies from 1980 to 2024. **Methodology:** The study follows a qualitative approach, supported by official statistical data. **Results:** Electoral participation in the first round of general elections increased until 2016 but significantly declined in 2021, while runoff election participation also saw a slight decrease. Participation in referendums was the lowest. Additionally, absenteeism was high, and voting trends leaned toward conservatism. **Conclusions:**

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Non-electoral participation is diverse, with notable engagement in associations, community organizations in various countries, and digital activism, primarily focused on cultural and social activities. Political participation occurs in relation to both the country of origin and the host country, leading to the development of political transnationalism, transnational citizenship, and an emerging transnational digital citizenship.

**Keywords:** citizenship; international migration; political participation; immigrant voting; Peruvians (from the UNESCO thesaurus).

## Resumen

**Objetivo:** caracterizar la participación política de los peruanos en el extranjero, a partir de la revisión estadística oficial y revisión de estudios empíricos, en el periodo de 1980 a 2024. **Metodología:** el enfoque es cualitativo, apoyado en datos estadísticos oficiales. **Resultados:** se observa que la participación electoral en las elecciones generales de primera vuelta crece hasta al 2016 y desciende significativamente en 2021, mientras que el balotaje también disminuye levemente, en tanto que la participación en los referéndums es más baja. Asimismo, el ausentismo es elevado, y el voto es preferentemente conservador. **Conclusiones:** la participación no electoral es diversificada, destacan las asociaciones, las comunidades en cada país y el activismo digital, y predominan las actividades culturales y sociales. La participación se realiza en relación con dos países: emisor y receptor, que se traduce en un transnacionalismo político, una ciudadanía transnacional y una incipiente ciudadanía digital transnacional.

**Palabras clave:** ciudadanía; migración internacional; participación política; voto inmigrante; peruanos (obtenidos del tesoro Unesco).

## Resumo

**Objetivo:** Caracterizar a participação política dos peruanos no exterior a partir da análise estatística oficial e da revisão de estudos empíricos no período de 1980 a 2024. **Metodologia:** O enfoque é qualitativo, apoiado em dados estatísticos oficiais. **Resultados:** Observa-se que a participação eleitoral nas eleições gerais de primeiro

turno cresce até 2016 e cai significativamente em 2021, enquanto a participação no segundo turno também apresenta uma leve redução. Já nos referendos, a participação é ainda mais baixa. Além disso, o absenteísmo é elevado, e o voto tem uma tendência predominantemente conservadora. **Conclusões:** A participação não eleitoral é diversificada, destacando-se associações, comunidades em cada país e ativismo digital, com predominância de atividades culturais e sociais. A participação ocorre em relação a dois países — de origem e de destino — configurando um transnacionalismo político, uma cidadania transnacional e uma incipiente cidadania digital transnacional.

**Palavras-chave:** cidadania; migração internacional; participação política; voto imigrante; peruanos (extraído do tesouro da UNESCO).

## Introduction

International migrations have transformed the political reality of countries of destination and origin, and there is an increasing presence of immigrants as political actors. As migration movements become more massive and global, they have generated diasporas that significantly impact the lives of the countries involved. Thanks to Information and Communication Technologies (ICT), a more sustained transnationalism has become possible, which reaches the political sphere; however, immigrants also face backlash in the form of restrictive control measures, discrimination, xenophobia, and criminalization.

Recipient countries have promoted immigration policies focused on care and integration, as well as on control, restriction, and expulsion of immigrants. Sender countries develop policies for linking and returning, as well as for voting and electoral participation." Other forms of participation include associations and unconventional forms, whether through direct networks or in cyberspace. Therefore, the participation of Peruvians abroad is analyzed to determine its characteristics and trends, as well as the patterns, networks, and activities they carry out.

The characterization of their political participation is based on official data (ONPE, JNE, INEI) and empirical studies (mainly in Spanish and some in English) conducted from 1980 to 2024, focusing on Peruvian immigrants in Spain, Italy, Chile, Argentina, and the United States. A qualitative approach and content analysis are chosen. The theoretical framework encompasses citizenship, cyber-citizenship, politics, and political participation.

The study addresses this introduction, a brief theoretical framework, and the analysis and discussion of results across four axes: Characterization of the migrant population, electoral participation and consultative councils, non-electoral participation, and participation in cyberspace. The study concludes with findings that synthesize and contrast the results with the theoretical framework.

## International Immigration and Political Participation of Peruvians Abroad

### On International Migration

Migration is defined [...] as the process in which the movement occurs from one country to another, or from one sufficiently distinct and distant region to another, for a prolonged period, implying living in another country and carrying out everyday life activities there. (Tizón-García cited in Micolta, 2005, p. 61).

Residential changes or displacements must "[...] have a relatively permanent character or a certain intention of permanence" (Micolta, 2005, p. 60). All countries are linked to international migration as destinations, origins, or transit points. This phenomenon is related to economic, political, social, technological, and environmental aspects (Chávez et al., 2021) and to the inherent inequalities of these processes, both at regional and global levels.

In the 21st century, the massification of international immigration has raised concerns in receiving countries, leading to both restrictive policies and measures that criminalize immigrants. However, it is also a transformative and disruptive phenomenon that affects the economies of origin, destination, and the global economy. Its impact has intensified with Information and Communication Technologies (ICT), through which immigrants weave support networks, recreate and strengthen identities, and develop social, economic, political, and cultural practices in transnational spaces of communication and participation. In practice, migration and ICT shape a digital transnational citizenship for immigrants (Fernández, 2021). However, they may also facilitate control, monitoring, location tracking, misuse of data, causing job losses among immigrants, and surveillance, in addition to easing administrative processing (IOM, 2022).

Furthermore, it has led to: a) international cooperation and attention from receiving countries to mitigate negative impacts and protect immigrants; b) greater social and ethno-cultural diversity in receiving societies, necessitating the transformation of migration policies, as assimilationist and multicultural approaches have been surpassed; c) the rise of hostility, discrimination, xenophobia, and criminalization against immigrants by host societies and their governments. According to Pickus (1998), international migration is perceived as a threat to societal norms, national identity, democracy, and even national security risks (Quiroz et al., 2023, p. 1854); and d) a necessary reflection on global inequalities,



investment in countries of origin to prevent emigration, and a critique of global policies that restrict human mobility while allowing the free movement of goods and raw materials to sustain a predatory and dehumanizing global capitalism. The IOM (2022) highlights similar characteristics and underscores the challenges of international migration and the need to reflect on the benefits it generates.

In this context, the political participation of immigrants emerges, who seek full integration into the receiving countries. Consequently, immigration becomes a political issue and has been incorporated into "[...] the disciplines dedicated to the analysis of government, and politics is one of the most interesting recent theoretical developments in migration studies" (López, 2002, p. 85). Immigrants transition from being objects and means of production to becoming socio-political subjects and agents of change.

## On Politics

Politics is:

[...] the activity related [...] to intervention, preparation, participation, criticism, opposition, support in adopting measures or making decisions [...] it is, in effect, an activity aimed at reforming or maintaining reality in a certain sense. [...] it is effectively directed towards the common good or the general interest of society (Solozábal, 1984, p. 146).

For Arendt (2018), politics is the capacity to argue and act with others who are equal yet different, to address public matters, which must be done in freedom. In this sense, power is exercised in relation to others, without domination, and requires three fundamental premises:

- a) **Politics is about being together and with each other of the diverse (Arendt, 2018, p. 3), which implies a power relationship among equals and in freedom.**

Politics does not involve exerting power over others by treating them as inferiors or as non-humans, with the aim of imposing order and safeguarding the rights of those who are more homogeneous in culture and lifestyle. Instead, it should be oriented toward egalitarian power relationships, even while being different, in plurality, without xenophobia or domination. In the case of immigrants, it means integrating them politically: granting access to services, rights, and full political participation.

**b) Politics as an activity with «the unavoidable purpose of dignifying individual and social human life».**

Politics is said to be an essential need for human life, both individual and social. Since humans are not self-sufficient and depend on others for their existence, the care of this life should concern everyone; otherwise, coexistence would be impossible. The mission and purpose of politics are to ensure life in the broadest sense (Arendt, 2018, p. 27).

Although Arendt does not subscribe to this idea for all human coexistence, it implies that the purpose of politics is the common good and that of the individual human being at the same time. From this perspective, its core is the human individual and their collectives, including immigrants. Thus, the approach analyzed by Arendt is modified to state that *politics is and must be an unavoidable activity to dignify human life, both individually and socially*. Therefore, states are obligated to transition from considering immigrants as objects of their policies to recognizing them as subjects of these policies and as political agents deserving of quality of life.

**c) Politics as political integration of immigrants and agency capacity.**

It is assumed that immigrants as human beings in a legal-political jurisdiction have fundamental rights, including organizing and participating politically. If politics includes the political system and its subsystems (pressure groups, unions, and military forces when making political decisions), as well as citizens, movements, and social organizations that intervene in public affairs (Sartori, 1987), it consequently includes immigrants as political subjects.

## **Citizenship, Cyber-citizenship, and Political Participation**

Citizenship encompasses four dimensions, although it is a unified and integral process: a) Recognized Citizenship: a set of rights assigned through legal, national, and/or local membership (citizenship rights) and global rights (human rights); b) Substantive or Lived Citizenship: the construction and exercise of rights, duties, and civic commitments to achieve greater autonomy, independence, and fulfillment as individuals and citizens; c) Citizenship Belonging and Identity: a relationship with a territory or community of reference, whether identical or different from what the state recognizes; and d) Symbolic Dimension: symbolic

representations and their socialization; symbols that legitimize the previous dimensions. The last two processes correspond to perceived citizenship (c and d).

When exercised in cyberspace, it gives rise to “cybercitizenship”, which includes participation, deliberation, and other rights such as the “right to be forgotten” (Mosseberger *et al.*, 2008), cyberactivism, e-participation, e-protest, and hacktivism (Fernández, 2012; Burgos, 2020; Avellaneda & Velázquez, 2021). When it takes place between two or more countries, as in the case of international immigrants, it generates digital transnational citizenship (Fernández, 2014; 2021).

For international immigrants, citizenship is transnational because it transcends territorial, legal, and cultural borders by means of: (a) Extraterritorial activities within the receiving country; (b) Cross-border (or transterritorial) interactions between two or more countries; (c) Supranational engagements, as seen in confederations or multinational unions (e.g., the European Union); and integration regions [real or imaginary] such as Latin America; and (d) Deterritorial practices, particularly in cyberspace. This citizenship [...] materializes relations in the political, social, economic, and cultural spheres of both the country of origin and destination [...] (Padilla & Ortiz, 2014, p. 40), from states, global spaces (international treaties, market, etc.), and the immigrants themselves.

Political participation is understood as the activity of citizens to influence political decisions (Van Deth, 2001, p. 4), whether in government, the political process, or civil society, directed at changing social structures and behavior patterns (Norris, 2002). It can be individual or collective, national or local, legal or illegal, violent or peaceful, verbal or written, voluntary or instrumental, with varying intensity (Conge, 1988; Sabucedo, 1996; Sabucedo *et al.*, 1990), electoral or non-electoral, traditional or digital. The most recognized classification is conventional and non-conventional (Barnes & Kaase, 1979; Sabucedo, 1989).

“Conventional” participation is based on legislation or an unwritten convention, and is socially accepted; it is carried out in: a) political campaigns, b) community activities, c) contact with the public administration, d) suffrage (Verba and Nie, 1972) and, e) post-electoral activities (Sabucedo 1988; Verba & Nie, 1972). The “non-conventional” participation is heterogeneous, traditional or digital. According to Kaase and Marsh (1979), it includes petitions, demonstrations, boycotts, legal and illegal strikes, occupation of buildings and streets, traffic blockades, and both legal and illegal activities (e.g., guerrilla actions, violence, and others).

## Key Tensions and Ruptures Related to International Immigration in the World

International migration produces three Key Tensions and Ruptures: a) citizenship-territory; b) citizenship-rights; and c) citizenship-culture (López, 2002, p.96):

a) Citizenship and territory: Crossing a state's borders implies [...] a jurisdictional change, breaking the classic link between citizenship and territory (p. 91). The responses have been even more restrictive "policies" [...] of control of migratory flows [...] (p. 85-86). The territory is transposed, legally or illegally, on the one hand; and rights are recognized or denied, immigrants are controlled, criminalized and expelled, on the other.

b) Citizenship and rights: There is a decoupling between [...] citizenship and rights (p. 98). Immigration breaks down legal boundaries: rights are granted to «non-citizens» in the receiving countries: the undocumented immigrants, including partial political rights (p. 99).

c) Citizenship and culture: Host societies and immigrants face cultural confrontations that transform citizen identities and cultures; [...] immigration challenges the classical structure of the cultural barriers of the political community through the incorporation of diversity into host societies and the erosion of traditional cultural barriers (López, 2002, p. 101).

As a result, multiculturalism increases, leading to racism, discrimination, xenophobia, and stigmatization of immigrants, such as what Cociña (2020) finds in Chile against Peruvians; but it also fosters intercultural processes of acceptance, solidarity, and mutual growth.

In this context, new ICTs promote immigrant integration while intensifying Key Tensions and Ruptures in host countries. At the same time, they produce cultural, political and citizen continuities with the countries of origin and destination, fostering digital transnational citizenship (Fernández, 2021), including political participation.

Some factors influence the relationship between international migration and participation: a) pressure groups (immigrant associations, businessmen, and pro-immigrant groups); b) liberal democracy institutions: rights, political parties, bureaucracies, court of justice and constitutions; c) international system mechanisms: human rights, supranational organizations, regional consultative bodies, and integration processes); d) political culture of immigrants and native citizens: socialization of citizenship, civil society, and relationship with states (Amescua & Luque, 2013), as well as citizen trajectory (previous political experience) (Fernández, 2010); e) citizen trajectory (previous political experience) (Fernández, 2010); f) borderline situations experienced by immigrants: this leads

them to organize and participate (Besserer, 1999); and g) political transnationalism of issuing governments.

## **Presentation and Discussion of Results**

### **Characteristics of Peruvian Migration in the World**

As of 2021, the countries of destination for Peruvians in the world are: The United States (30.2%), Spain (15.4%), Argentina (13.5%), Chile (11.8%), Italy (10.2%), Japan (3.7%), Canada (1.9%), Venezuela (1.7%), Brazil (1.7%), France (1.2%) and Germany (1.0%). The cities with the most Peruvians abroad are: Buenos Aires (10%); Santiago de Chile (9.5%), Madrid (7.2%), New Jersey (4.5%), New York (4.1%), Barcelona (3.9%), Miami (3.9%), Milan (3.6%), Los Angeles (3.0%), Virginia (1.8%), other cities (48.6%) (INE, 2022).

In the II global survey of Peruvians abroad, carried out between November 2021 and May 2022 among Peruvians aged 18 years and older, it was found that: 54.5% are women and 45.5% men; between 18-29 years: 14.5%; from 30-59: 67.1%, and from 60 to over: 18.4%; of which 61.7% are couples, 30.3% single, 5.9% divorced and 2.1% widowed; they migrated for economic reasons: 50.7%, studies: 8.0%, family unit: 27.2%, and other reasons: 6.9%. Regarding migratory status in the host country, 38.2% had permanent residency, 27% were citizens of the host country, 7.5% held valid work visas, 5.1% had tourist visas, 2.7% were on student visas, 0.2% had humanitarian visas, 2.9% had other types of visas, and 16.5% were undocumented. In terms of education level, 50.4% had higher education, 25.6% secondary education, 19.2% postgraduate studies, and 4.8% primary education.

The distribution of the Peruvian population by continent is as follows: America (66.4%)—with North America accounting for 33.3%, South America 32.2%, and Central America 1.0%; Europe (28.8%)—mostly in Spain and Italy; Asia (4.2%)—primarily in Japan; and Oceania (0.6%). There are few Peruvians in Africa (INEI, 2018). Most Peruvians reside in Chile, Argentina, the United States, Spain, Italy, and Japan, consistent with the 2022 survey.

Regarding connection with their country of origin, 67.6% reported purchasing Peruvian food products, 37.7% Peruvian beverages, 10.5% clothing, 10.0% handicrafts, 9.1% music, 1.0% other items, and 17.9% did not purchase any Peruvian products. Additionally, 39.9% sent remittances, while only 18.3% expressed a desire to return to Peru permanently. In terms of organizational affiliation, respondents reported belonging to cultural organizations (16.1%),

religious organizations (13.9%), humanitarian support groups (13.1%), sports organizations (10.3%), student groups (8.6%), scientific associations (8.5%), commercial organizations (6.4%), industrial organizations (6.1%), unions (5.4%), and other organizations (11.6%) (INEI, 2022). No reference is made to political organizations, although it may be included in the category of others.

Electoral Participation of Peruvians Abroad

Table 1. Vote of Peruvian emigrants worldwide, 1980 – 2021.

Year	Type of E.	T. Electoral P.	Electoral P. N. T.	Votes Abroad P.	Votes Abroad
2021	CE2				363,640
2021	CE1	25,287,954	24,290,921	997,033	227,902
2020	CCE	24,799,384	23,825,154	974,230	
2018	RE	24,373,821	23,465,982	907,839	216,359
2016	CE2				389,529
2016	CE1	22,901,954	22,017,030	884,924	472,027
2011	CE2				378,792
2011	CE1	19,949,915	19,195,761	754,154	402,563
2010	RE1	19,595,277	18,878,314	716,963	118,565
2006	CE2				282,944
2006	CE1	16,494,906	16,037,015	457,891	290,728
2001	CE2				
2001	CE1	15,161,916	14,906,233	255,683	132,443
2000	CE2				
2000	CE1	14,794,767	14,567,468	227,299	112,967
1995	CE1	12,417,946	12,280,538	137,408	71,245
1993	RE1	11,620,820			
1990	CE2				
1990	CE1	10,013,225	9,923,962	89,263	40,436
1985	CE1	8,333,433	8,282,545	50,888	37,809
1980	CE1	6,471,105	6,431,655	39,450	20,790

Source: Own elaboration based on ONPE data (2006a, 2006b, 2011a, 2011b, 2016a, 2016b, 2018, 2021a, 2021b), JNE (2024) and Castillo (2018).

Note

*Type of E.:* Type of Election.

*Electoral P.:* Total Electoral Population.

*Electoral P. N. T.:* Electoral Population in National Territory.

*Votes A.:* Votes Abroad.

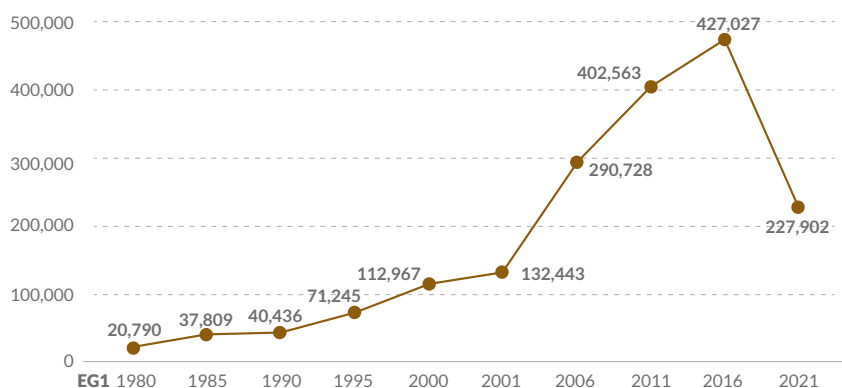
*CCE:* Complementary Congressional Elections.

*RF:* Referendum.

*CE1:* First Round Congressional Elections.

*CE2:* First Round Congressional Elections.

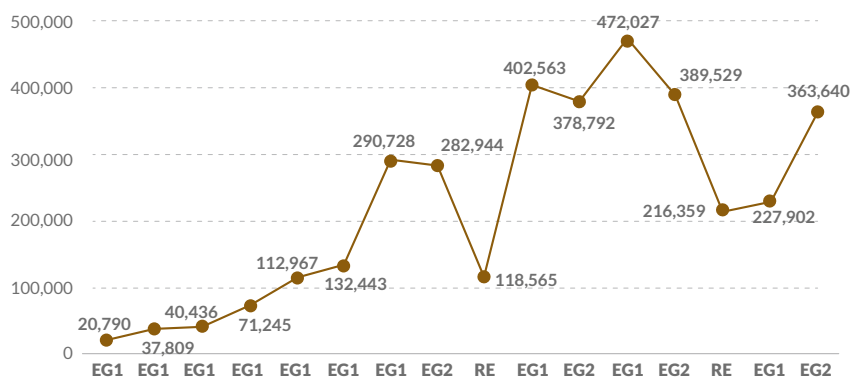
Voting participation among Peruvians abroad steadily increased between 1980 and 2016 (Figure 1). Compared to the eligible electoral population, it remains very low, and significantly decreases in the first round of 2021, even lower than in 2006. The electoral context in 2021 - characterized by an unknown candidate from a Marxist party and the discredited Fujimorist candidate, in a predominantly conservative electorate and with strong opposition to Fujimorism - may help explain this decline.



**Figure 1.** Evolution of voting abroad in CE1 1980 - 2021.

Source: Own elaboration based on data from ONPE (2006a, 2011a, 2016a, 2018a, 2021a) and Castillo (2018).

In runoff elections, voting turnout is lower than in the first round and even lower in referendums. The exception is 2021: In the first round, voter turnout was 227,902 (22.85%), and in the second round, it increased to 363,640 (36.475%) (Table 1 and Figure 2). Absenteeism was high; in the first round of 2021, it reached 769,131 voters (77.14%), and in the second round, 633,393 (63.58%). Fujimori obtained 66.19% of the votes, while Castillo garnered 33.81%.



**Figure 2.** Evolution of the vote abroad in CE1, ECE2, and RE, 1980 – 2021.

Source: Own elaboration based on ONPE data (2006a, 2006b, 2011a, 2011b, 2016a, 2016b, 2018, 2021a, 2021b), and Castillo (2018).

Voting trends abroad primarily favor right-wing parties and candidates: In 1980, Acción Popular (AP) obtained 40.6%; in 1985, Alianza Popular Revolucionaria Americana-APRA reached 52.60%, Democratic Convergence (CODE) led by the Christian People's Party - PPC obtained 28.80%, AP 4.50%, and United Left - IU 11.40% (Castillo, 2018), with the historical right-wing totaling 33.3%. Votes were cast for a centrist party, APRA. In 1990, the traditional right-wing alliance, FREDEMO, led by AP, obtained 64.70%; Cambio, 15.60%; APRA, 8.80%; IU, 4.20%; Socialist Left - IS, 3.80%; and other parties, 2.90%; with the left totaling 8%. In 1995, Cambio 90-Nueva Mayoría obtained 79.42%; Unión por el Perú (UPP), led by Javier Pérez de Cuéllar, received 15.99%; APRA, 1.32%; CODE, 0.86%; Obras, 0.62%; FREPAP, 0.39%; AP, 0.12%; and others, 0.67% (Castillo, 2018). Fujimorism, representing the new right and the moderate right through UPP, concentrated the vote, practically erasing the left from the electoral map.

In 2000, Alberto Fujimori with “Perú 2000” (P2000), received 51.20% of the votes; Perú Posible, 35.10%; APRA, 1.80%; AP, 1.20%; and UPP (center-left), 0.50%. In the first round of 2001, Unidad Nacional (UN) obtained 51.70%; PP, 28.30%; APRA, 13.90%; Independent Moralizing Front – FIM, 3.60%; and others, 2.5% (Castillo, 2018). AP disappeared, the left joined UPP, and the right predominated with UN, PP, and FIM, together totaling 83.6%.

In 2006, in the first round, foreign voting (presidential) was as follows: UN, 58.23%; APRA, 16.90%; Gana Perú, 12.58%; Alianza por el Futuro (AF), 5.22%; and others, 7.05% (ONPE, 2006a); in the runoff, APRA, 68.48%, and UPP, 31.52% (ONPE, 2006b) The right-wing discourse of García Pérez prevailed, despite the



corruption of his first government, defeating Humala, who was supported by the left and promoted an anti-neoliberal message.

In 2011, in the first round, Fujimorism, with Fuerza 2011 (F2011), obtained 28.62%; Alianza para el Gran Cambio (APGC), 28.62%; Perú Posible, 15.08%; Alianza Solidaridad Nacional, 13.44%; Gana Perú, 12.86%; and others, 1.42% (ONPE, 2011a). In the second round, 70.37% voted for F2011, and 29.62% for Gana Perú (ONPE, 2011b).

In 2016, Popular Force (FP) (Fujimorism) obtained 39.86%; Peruvians for Change-PC 21.05%; Broad Front (left): 18.74%; AP: 6.97%; APRA: 5.83%; Direct Democracy: 4%; and others: 3.54% (ONPE, 2016a). The total left-wing vote amounted to 22.74% (Broad Front by Mendoza and Arana, and the 4% from Gregorio Santos); the far right reached 60.91%. In the second round, 50.93% voted for PC and 49.06% for FP (ONPE, 2016b). The left-wing vote supported «Peruvians for Change» (right).

In 2021, in the first round, Renovación Popular (far-right) reached 21.47%; FP: 14.15%; Avanza País-Partido de Integración Social (right): 13.31%; Juntos por el Perú (left): 13.10%; AP: 7.18%; Victoria Nacional (right): 7.15%; Perú Libre (left): 6.58%; Partido Morado (center-right): 3.98%; PC: 1.94%; Podemos Perú (right): 2.57%; Alianza para el Progreso (right): 1.90%; Somos Perú (right): 1.77%; APRA: 1.16%; Perú Patria Segura: 0.80%; Frente Amplio: 0.67%; Unión por el Perú: 0.59%; Democracia Directa: 0.38%; Renacimiento Unidos Nacional: 0.45%. In the Second Electoral Round, Keiko Fujimori, from FP, obtained 66.48% of the votes, while Castillo, from Perú Libre, obtained 33.51%. Voting trends abroad favored the right.

Political participation in elections in host countries has been corroborated in Spain (Iglesias, 2011; Bermúdez & Excrivá, 2016; Moya & Viñas, 2021), Argentina (Moreira, 2013), and Chile (Pujols, 2020), indicating that many Peruvians participate in dual electoral processes. There are no systematized statistics on electoral participation in these countries, and due to time constraints, data from existing electoral registers were not included. However, in cases such as Chile, where participation without naturalization is possible, significant involvement of eligible Peruvians has been observed.

### **Non-electoral Participation Promoted by the Government: Consultation Council in Peruvian Communities**

It is an institutional body that promotes the participation of Peruvians living abroad in support of consular functions. It was established by Ministerial Resolution (MR) No. 1197/RE on 08/11/2002 and its amendment MR No. 0687/

RE on 21/10/2004. In 2010, Law 29495 was issued along with its regulation DS No. 057-210-RE, later amended by DS No. 027-2012-RE, which changed the percentage of registered Peruvians required to validate the Consultation Council election (Presidency of the Republic, 2012).

A "Consultation Council" is defined as: "[...] an expression of the Peruvian civil society residing abroad", whose purpose is "[...] to constitute a space for dialogue and cooperation to combine efforts to contribute and guide the resolution of problems faced by compatriots residing in the respective consular jurisdiction" (Law 29495, Articles 2-3). According to the Ministry of Foreign Affairs (cited in Araujo & Eguiguren, 2009, p. 7), its goal is to serve as a liaison to strengthen consular actions. This aligns with incorporating Peruvians living abroad as part of consular support (Kufoy, 2011). However, in practice, it also serves as a space for civic proposals, such as the legislative representation initiative for Peruvians abroad, promoted by European consultative councils (Fernández, 2010).

The functions, calls, election of the electoral committee, and proclamation of winners are managed by consulates; therefore, it is a consular rather than a civil society body. This is corroborated as they are directed from Lima by the Secretariat of Peruvian Communities Abroad (Lázaro, 2007). Nor is it a "[...] representative associative body of the Peruvian community residing in the consular office's jurisdiction, non-profit, autonomous, independent [...]" as stated by Lázaro (2007, p. 283), since council representatives in their conventions demand autonomy, recognition, and representation (Valdivia, 2008). They lack true independence and representativeness, since their composition is determined more by government appointment than by grassroots democratic processes.

Among its achievements and limitations are:

- - It constitutes an instance with democratic potential to unify Peruvians, address their problems, and collaborate with the consulate.
- - According to the law and Kufoy (2011, p. 50), it can assist in integrating Peruvians into host societies and asserting their rights before consulates. Limitation: due to the number of members, lack of resources, and the large number of immigrants, achieving this is unfeasible.
- - Based on four conventions held up to 2008, there is a link between councils and the holding of annual international conventions, where progress, limitations, and demands were evaluated: greater autonomy, amendment of regulations and functions (as they are restrictive and limited), more resources for better consular functioning and services, consular tax, oversight functions, and timely and complete information

on consular functions and activities (Consultation Councils of Peruvian Communities Abroad, cited in Valdivia-Manchego, 2008, p. 35-36).

Other limitations include elitist constitution (representing upper or middle classes, not lower ones), divergent positions among Peruvians (Berg, 2010), and a lack of institutional capacity to fulfill its functions. However, it is essential to note that, besides the lack of information from consulates, most Peruvians do not participate.

## Conventional and Unconventional Participation of Citizens

### Associations.

Associationism is the most widespread form of participation among Peruvians abroad. Social (conviviality and fraternity) and cultural associations are the most abundant, but political and economic ones, though fewer, play a significant role. Those with specific political objectives and actions have a notable presence in Chile, Argentina, and Spain.

**Tabla 2.** *Asociaciones en América.*

Country	Associations	Source
Chile	Association of Peruvians Living in Santiago de Chile (AFERS); Human Rights Promotion Organizations: Association of Immigrants for the Integration of Latin America and the Caribbean (APILA); Andean Program Association for Human Dignity (ProAndes); Committee of Peruvian Refugees; Organizations linked to entrepreneurs and economic elites associated with the consulate: Grupo Paracas, Peruvian Club, Peruvian Women's Association; Migrant Workers' Assembly Union; cultural and religious organizations.	Stefoni, 2004a; 2004b. Luque, 2009; 2007; 2006, 2004.
	The National Coordinator of Immigrants (CNDI), created in 2014 from Peruvian organizations, brings together grassroots organizations from different countries and engages in political activism; Peruvian Political Refugee Committee.	Luque and Rojas, 2020; 2021.

Country	Associations	Source
United States	For example, in Atlanta, the list includes the Georgia Chamber of Commerce, the Peruvian Residents Association, and the Huancaayo Residents Association. In Boston, Peruvian American Community, Peruvian Community of Massachusetts, United Peruvians Association, and Inca Runa Association. In North Carolina, Peruvian Association of North Carolina and The United Peruvian Association of Nashville.	González-Lara, 2019.
	Chicago hosts 15 similar organizations, Denver 20, Harvard 18, Los Angeles 22, and Houston 10. Their activities include commercial, cultural, religious, and collective actions, fostering sociocultural and transnational communities, where identity markers are nationality, music, and gastronomy.	
	The Convention of Peruvian Institutions in the USA and Canada (AIPEUC) gathers leaders from approximately 50 associations, including political development projects, and forms a Democratic Network.	Paiva, 2002.
	In 2000, Altamirano identified 200 Peruvian organizations in the United States, mostly cultural and social (90%) and environmental conservation (40%).	Altamirano, 2000.
	The World Federation of Peruvian Institutions Abroad – FE-MIP (2016), headquartered in Florida (USA), was established on 02/24/2000 as a non-profit organization, integrating various Peruvian organizations in the United States, Japan, Canada, and Venezuela to facilitate educational, social, assistance, and aid exchanges with Peru, and to unite Peruvians living abroad.	FEMIP, 2016.
	In Miami, [...] political movements that promote the participation of migrants in the politics of Peru and the United States (Altamirano, 2000, p. 76).	Altamirano, 2000.
	Cabanaconde City Association (CCA)-Washington, an organization of emigrants from Cabanaconde, with a broad relationship with its origin and strong transnational and undocumented migration networks, which contributes to development in Peru; it makes an Andean transnationalism possible, promoting civic and social activities in the destination and development cooperation in the country of origin. Similar work, but with less impact, is carried out by the Bolognesi Social Club (CSB): emigrants (legal migration) from this town (Bolognesi) from Pallasca in Ancash to Hartford.	Paerregaard, 2013 Paerregaard, 2008.
	In New Jersey, The Peterson Association, a sociocultural and community organization, has significant political involvement through its leaders and employs informal organizational methods linked to their country of origin. Muschi refers to these as "alternative social organization practices" typical of Peruvians in the United States.	Muschi, 2021.

Country	Associations	Source
Argentina	One political refugee association, called A, is politically active, while another, called B, focuses on human rights and support for victims of violence. These organizations consist of Peruvians who belong to the refugee movement from Bolivia, Uruguay, and Chile, primarily composed of men and previously supported by the May 19th Movement (M-29).	Cicogna, 2009.
	Unions. Peruvian women: Peruvian domestic workers in Argentina participate in the union SINPECAF.	Mangliano et al., 2017. Velázquez, 2010. IIGG y OIM, 2019.
	The Association of United Peruvian Migrant and Refugee Women (MPUMR) has over 300 members, while the Civil Association of Human Rights for United Migrant and Refugee Women in Argentina (AMUNRA) started with few members but has grown significantly.	
	The Peruvian Ladies Association, present in almost all countries of migration, mainly comprises the wives of officials, entrepreneurs, and traders.	
	The Civil Association ALASS promotes social, cultural, and sports activities, organizing social or cultural events for the Peruvian community and the host country (specifically the Buenos Aires community). Civic initiatives include cooperation with the Peruvian Consulate and the Buenos Aires city government to establish Peru's Cultural Month.	Lapenda, 2022.
	The Network of Migrant and Refugee Women in Argentina, founded by a Peruvian woman, brings together immigrants from different countries and has given rise to the Frente Patria Grande. It is a kind of confederation with more than 30 organizations. Like AMUMRA, she is very active, both using social media to amplify their impact. The work of these two is eminently political, alongside providing support and counseling for immigrants.	

In the United States, although most organizations have social and cultural purposes (Altamirano, 2000), they also play a political role as they function as pressure and support groups in local and federal elections. In the latter, they generally support the Democratic Party; likewise, their organizations are often used for political purposes in Peruvian electoral campaigns (Tamayo cited in Paiva, 2002, p. 134) and in certain significant political causes, such as the overthrow of Alberto Fujimori and the March of the Four Corners (Interview with the Third Secretary of the Cultural Heritage Directorate of the Peruvian Ministry of Foreign Affairs, cited in Paiva, 2002, p. 134). Moreover, cultural activities, parades, and religious festivities constitute transformative actions in host societies, contributing to the cultural and civic revitalization of immigrants. These events reflect the tensions between citizenship and rights, and between citizenship and culture.

Organizations in Chile and Argentina have shown significant political activism since the 1990s, although sociocultural activism is more prevalent. AMUMRA and the Network of Migrant and Refugee Women in Argentina are examples of strong political activism that continues to the present day, especially active on social media. Barrera (2024), citing official Chilean records, identifies 62 mixed associations (comprising members from different countries) and 31 Peruvian associations, exceeding the number of Haitian (26) and Colombian (23) associations. It is specified that among the Peruvian associations, 20 are led by men, 10 by women, and one remains unidentified. Additionally, both recent associations (established after 2018) and those dating back to the 1990s and prior to 2018 hold significant social and political centrality. Activism has been sustained between 2010 and 2020 through their organizations, such as the Peruvian Refugee Committee and the National Coordinator of Immigrants, opposing migration policies (Luque & Rojas, 2021; Pujols, 2020) as well as social policies. At the same time, they participate in Chilean elections because the right to vote is recognized for immigrants with five years of residence. In this context, in the 2017 legislative elections, 16.4% of Peruvians from a list of 59.4% qualified voted (Pujols, 2020).

In the United States, associations are mainly focused on social and cultural activities, including civic events that bring together citizens and authorities. These associations are characterized by a translocal or transnational associative model, where the community interacts with clientelism linked to leaders and entrepreneurs who support the Peruvian collective while pursuing their own political interests. An example is the case of Paterson, where more than 20 community organizations existed in 2009, and with some degree of local political involvement from leaders and merchants, they established the Peruvian Parade Inc. in 1986 as the first formal institution.

Since then, the first commission for the National Day parade has also taken place, and what is now known as the first Peruvian neighborhood, "Little Lima" was proposed in 2008. Furthermore, in 2016, Paterson was recognized as the center of the Peruvian diaspora in the United States, a result of informal organization with characteristics brought from their country of origin (Muschi, 2021). Through this associativism, they participate in politics when specific national issues arise or during elections.

## Europe.

Spain and Italy have a greater presence of Peruvian immigrants, although associative activity is also in other European countries.

**Table 3.** *European Associations.*

Country	Associations	Source
Italy	Associations, with their members, trade unions, formal associations united by their nationality, culture and gastronomy, have a participatory political culture. In this way, associationism is an instrument of civic and political participation and links between local institutions and citizens, who vote in local elections when the opportunity to participate opens up.	Santoni, 2013
	National Coordination of Peruvian Associations and Organizations in Italy (CONAPI) and Eurolatina Peruvian association. Tendency of Peruvians to organize.	Grasso, 2009; 2010. Tamagno, 2003a; 2003b.
	Association of Huachuquino Residents in Milan; Tahuantinsuyo Cultural Association. There is a transnationalism of the Huachuquinos and the use of ICTs in this process.	
Spain	Peruvian cooperation association in Aragon-Spain (Zaragoza City Council, 2024).	
	Federation of Peruvians in Catalonia.	
	Human Rights Association (APDH, for its Spanish abbreviation); Committee of Solidarity with the Peruvian People (COSPU, for its Spanish abbreviation).	
	Markapas-Peru in Madrid since 1992, an association of economic immigrants, asylum seekers, and refugees that is assumed as a left-wing commitment. It is devoted to assistance, autonomously.	Ferrás & Martín, 2019.
	Inkarri-Peru exists since 1993: Peruvian political refugees, interacts with other organizations in Peru and Spain, promotes political debate, gives help and legal advice to Peruvians; relationship with its bases and other organizations.	Veredas, 1998; 2003.
	Peruvian Cultural Association in Alcobendas: Cultural identity, social cohesion and civic actions among Peruvian immigrants.	
	Grupo Mujer Peruana, since 1995: It helps immigrant women and maintains relationships with organizations at the Centro Hispano-Peruano in Madrid since 1983.	
	Casa de Perú in Madrid, since 1977: Elitist and works in coordination with the Consulate of Peru, it is not democratic, questioned by the misuse of resources. Maintains relations with Peruvian authorities, locals in Spain and other related Peruvian associations.	

Country	Associations	Source
Spain	PUM-Peru (Partido Unificado Mariateguista) of Madrid, with an indigenous nationalist proposal, created in 1973: It offers legal advice and maintains relations with the PUM of Belgium, Germany, Holland and Peru.	
	Association of Peruvian Refugees and Immigrants in Spain – ARI-Peru. It has offices in Madrid, Navarre, Catalonia and the Basque Country.	Oca & Lombardero, 2018; Moraes & Cutillas, 2018; Moraes et al., 2013; Bermúdez et al., 2014.
	Asociación Nueva Casa del Perú in Madrid, Spain: It seeks to develop social good projects and provide services to the Peruvian and Hispanic community.	
	Asociación de Peruanos de Burela (ASPEBU) and Asociación Sociocultural Raíces Peruanas de Burela, organized by women.	
	Federation of Peruvian Associations in Spain (FEDAP) and Peruvian Federation in Catalonia (FEPERCAT): They received support from the Catalan socialist government and the second government of APRA, they have transnational relations. In 2010, an association linked to Christian democracy and the Peruvian right emerged (Moraes et al., 2013).	Aparicio & Tornos, 2010. Cebolla y López, 2015.
	In Spain, as of 2010, there are 35 associations.	
	Peruvian associations studied by Cebolla and López (2015) are formalized associations that transition from being civic organizations to becoming promoters of development, imitating successful Spanish foundations and taking advantage of their links with institutions to create business opportunities or productive ventures, but they are mainly civic.	
	ARIPERU, founded in 1992, transitions from being a defender of Peruvians (1992-1992) and self-managed to a non-governmental organization (NGO) with the capacity to communicate with the government. It achieves a network of links with other organizations and government institutions, and participates in the discussion and representation in the process of reforming the immigration law; with a role, therefore, eminently political.	Veredas, 1998; Merino, 2002.
	Federation of Peruvians without Borders, founded in 1998, which addresses country of origin policy, immigration policy and trans-local policy.	Vancea & Boso, 2017.

In these countries, associationism works in a network, with centrality in cultural, social and religious organizations, but there are also policies whose role is significant in the integration of immigrants and in the political action of origin and destination, such as those specified in the tables. Sisters have great integrating, participatory and civic power, mainly the *Lord of Miracles Sisterhood*. In addition, the organizations serve as support and protection against the majority society (Merino, 2005; 2002). Political organizations are more oriented to the



defense of rights and analysis of reality (local and country of origin), legal advice and political dialogue; cultural, social and religious are also spaces of identity-symbolic support, civic and development cooperation.

The associationism of companies and businesses favors the formation of transnational circuits and communities, and even of transnational citizenship. Thus, the work of the associations can be summarized in: Spaces of coexistence, solidarity, reciprocity and debate of the Peruvian, Chilean and global reality. They are a space for the reconstruction of Peruvian and cultural identity (Peña, 2004). They also carry out co-development activities (Sanmartín, 2011), humanitarianism or solidarity.

However, they are not limited to dialogue with governments, defense of immigrants or help in their integration. They also participated in working groups around migration laws and other events of local and national policy of origin, and destination, together with immigrants from other countries; for example, the case described by Escrivá (2013) in Spain: They participated in events against local governments, with the indignants and in campaigns against Peruvian politics, in a double participation. It is a consistent fact in the United States, Chile, Argentina and Spain, and it is not limited to electoral participation. Thus, in Chile, organizations such as the Warmipura Network, Pasiones peruanas Chile, the Sindicato Nacional Interempresa de Trabajadoras Inmigrantes de Casa Particular (SINANCAP) and the Peruvian Refugee Committee do what the Chilean State has not done, materially and socio-culturally, through its deficient public policies, nor does Chilean society do to integrate the immigrant (Borquez & Salvo, 2015).

This study deals with the electoral period 1980-2021 and, from the 1990s to 2024, with associationism and non-conventionalism. In the 90s, during Fujimorism, within the framework of armed subversion, migration was not only for economic but also political reasons; which gave rise to political actors and organizations, which are significant in Chile, Argentina and Spain. It is also more heterogeneous, because it is not limited to the upper or upper-middle classes, common in the 1950-1980 period, but low. There is also a significant female presence and a significant percentage of qualified people, with a constant participation that is consolidated.

Non-electoral participation, associative or not, occurs in the spaces of marginality of immigrants in the processes of integration in front of society and recipient governments, which do not promote their integration, and of policies that are, first, deficient and of rejection, and, later, of protected assimilation, but also a sector of the middle classes. In Chile and Argentina, grassroots organizations are building more autonomous political participation, which takes advantage of the spaces for relations with other organizations in the destination country.

This strengthens solidarity and collective values, which favors their activism and autonomous integration. It also happens in the United States, although not with political objectives, but social and cultural ones.

In Spain, a similar trend is observed at the beginning, but as it consolidates, a competitive and clientelistic associationism is born, uprooted from ordinary Peruvian citizens, who in this century seek to overcome themselves. A common trend in all countries is the consolidation of organizations, although there are temporary associations, which serve short-range purposes and disappear. The political does not constitute the bulk of organizations, but in times of elections or difficult political situations (for example, the rise to power of Boluarte, the opposition to Keiko Fujimori), non-political organizations assume a political position and activities.

The studies reviewed show that it is immigrants who build and consolidate their organizations over the years. In Chile, there is greater support from Chilean associations for immigrants, but there are insufficient elements to evaluate the degree of support from the State or society to favor associationism or not. The Peruvian government, for its part, has built bridges through consultative councils, with limited results. Likewise, associations have migrated to cyberspace to expand their activity and reach. The majority of immigrants are not interested in political associations, utilitarian-individualist thought-action is imposed on the citizen-community, with the exception of civic and cultural coexistence, where Peruvianness or the regional is reinvented.

### Community.

In these countries studied, there is a tendency among Peruvians to join a local community, establishing direct ties, whose main identity marker is nationality (Peruvian), in addition to its culture, gastronomy and festivities. The community is built as a socio-political space in the host cities. It is the main social, economic, political and cultural space, with micro spaces of coexistence integrated into its organizations, culture, gastronomy, civic and religious festivals. This responds to a reticular structure, strengthened with digital ICTs.

Its culture is inclusive within the community, differentiating-integrating towards the receiving society, and of rupture and integration in the country of destination. Its religious festivities are significant in this sense: The main one, "*El Señor de los Milagros*" [the Lord of Miracles]; and cultural activities such as the Cultural Parade of New Jersey and the National Holiday Parade in New York, which are the result of a network of organizations, leaderships and the Peruvians who participate.

Altamirano (2000) points out for the United States, Luque (2004) and Stefoni (2004a, 2004b) in Chile, that Peruvians have established socially, culturally, religiously and civically cohesive, relatively united and quite homogeneous communities. This also happens in Spain and Argentina. They form a network of social, cultural, religious, solidarity and political organizations and activities, which with ICTs facilitate their consolidation. The community has a symbolic sense of belonging and identity. Political activism has been present since the 1990s (Altamirano 2010; Melella, 2013b; Luque, 2007; Bermúdez et al., 2014; Veredas, 1998). Likewise, transnational ties are strengthened in three ways: a) activities beyond the territory of origin with the country of destination, b) with the country of origin and c) with immigrants of other nationalities.

### **Complaint, Protest and Local Campaigns.**

They are carried out directly and digitally. Forms of participation have been recorded since the 1990s in campaigns against constitutional change in 1993 in Spain (Bermúdez *et al.*, 2014). Escrivá (2013) documented various forms of Peruvian participation, including involvement in the '¡No a Keiko!' campaign -which united collectives from France, Switzerland, and Italy via the 'No a Keiko' platform- protests against political proposals, symbolic acts like flag washing to signal anti-corruption, support for indigenous communities and campaigns against mining companies (marches and digital activism); and local demonstrations and campaigns in Spain: 15M, the indignados and in political-electoral campaigns (directly and the Internet). Veredas (1998) noted the participation of Peruvians in complaints of human rights violations and in cooperation projects with Peru since before 1993; coordination between several associations (Coordination of Solidarity Associations with Peruvians); in the debate on the Peruvian reality, 1993; and protest activities against the new Asylum Law in Spain (Markapasa of Peruvians participated).

Political activism is common with immigrant organizations from other countries that seek political integration and extension of rights to immigrants in receiving countries: In Spain with African and Latin American organizations, in Argentina around the citizen rights of Latin American residents and neighboring countries (Morales, 2012), in Chile around their rights and integration. The issue of rights is integrative for the organization and political action of immigrants. In the USA, they participate in marches and protests for the approval of the "Border Protection, Anti-Terrorism and Illegal Immigration Control Act" in different cities in the United States (Luque, 2009). In Miami, "[...] political movements

that promote the participation of immigrants in the politics of Peru and the United States" (Altamirano, 2000, p. 76).

On the Internet, they participate in Facebook, Twitter and YouTube (Melella, 2016, 2013a). In 2006, participation in cyberspace was not significant among Peruvians abroad. Participation in electoral campaigns and cyberactivism against specific causes (the main one, against Fujimorism) began in 2011, intensifying in the electoral periods of 2016 and 2021. In the period 2023-2024, it increased due to the coup d'état against Pedro Castillo and the repression of the government of Dina Boluarte, with the Internet being an information and activism space with the participation of Peruvians abroad and communicators such as: El Jota (Alternative Press - El Jota), from the United States, and Ynti Noticias from Spain.

## Conclusions

Electoral participation among Peruvians abroad steadily increased between 1980 and 2016; participation is higher in the first round compared to runoff elections, and it is lowest for referendums. A first pattern-breaking incident was in 2021: In the first election round the vote was lower than in the second. The voting trend is for rights proposals and very high absenteeism.

Social, cultural and religious associationism is the main form of participation, with an active cultural civic community. Economic and political organizations favor transnationalism (economic and political) and transnational citizenship. Political activities focus on human rights, analysis of the current reality, solidarity and development cooperation.

Electoral activism increases in presidential elections; marches and sit-ins (unconventional participation) are temporary in response to serious events at the origin and destination, or when their rights are threatened, but also for other reasons. In cyberspace, political participation in cyberspace has been growing and taking on new characteristics since 2011. It is increasingly influenced by Peruvian YouTubers living abroad, while digital networks serve as platforms for both communication and activism.

Likewise, social, economic and cultural organizations are spaces for political activities. Religious organizations, in particular that of the "Lord of Miracles", function as community integrators in which economic, social, cultural and civic activities converge. Politics is not the goal of almost all organizations, but in important conjunctural cases or in elections they take a position.

Regarding the three key tensions and ruptures - Territory and citizenship, Citizenship and rights and Citizenship and culture - that López points out, it is found:

- Territory and citizenship. It manifests itself more strongly with the undocumented, which the reviewed studies address little. However, from the documentary analysis, it is found that the policies of the states are oriented to the restriction and control of entry, construction of walls and expulsion, increasingly frequent, which favor the stigmatization and criminalization of immigrants.
- Citizenship and rights. It is a process that everyone goes through when doing their legal, labor, educational and health incorporation procedures. Peruvian organizations assist and help them. The political activities in this case are: a) management before authorities of the receiving and origin countries; b) coordination and management with other Peruvian organizations and other nationalities; c) political participation in the elections of the receiving country as a country of origin, and the analysis of the general problems of each space (origin, destination and global) and of immigrants and their rights; d) solidarity with Peruvians in the destination and origin; and e) cooperation for development.
- Citizenship and culture. It determines the difference with the receiving society, which favors integration because: a) the receiving society values Peruvian culture and gastronomy; and b) it differentiates them from others, socially and culturally, giving them identity, sense of belonging and social support. However, it is also the space of marginalization, stigmatization and criminalization.

Immigrants prefer participation in their respective communities, organizations and networks, which favors continuity in Peru in three directions: 1) building and strengthening relationships with their country of origin, 2) with the country of destination in their organizations and communities (most important socio-political space and with immigrants of other nationalities), and c) with the authorities, their labor and social networks in the receiving society.

The dimensions of citizenship are experienced in their daily lives: They exercise rights; they strengthen, reconfigure and create new identities, and participation with the two countries. They build multiple identities (Ferrás, 2018). Many have nationality of the receiving country (according to the 2022 II survey, 27% of naturalized Peruvians), which enables them to have dual citizenship.

Others do not have it, but participate politically. Their symbolic representations and identity markers (nationality, national symbols, music, dances, gastronomy, etc.) acquire special relevance for them. In this process, ICTs play a fundamental role in their transnational relations and identities due to the omnipresence of their culture on the Internet.

Among Peruvian immigrants in these countries, the following are observed as the most influential factors for their political participation: a) pressure groups (immigrant associations, businessmen and pro-immigrant groups); b) institutions of liberal democracy: inclusive governments and their bureaucracies, in particular local ones; c) mechanisms of the international system (human rights); and d) participatory political culture: citizen trajectory of origin and; e) the political transnationalism of the Peruvian government (suffrage and consultation councils).

Their most important unconventional participation is: Demonstrations and occupation of streets (sit-ins) in front of consular offices or embassies, cyberactivism in presidential electoral campaigns and important conjunctures, information-participation in their social networks and immigrant journalism in digital networks.

These facts, from a perspective of equality and political integration focused on the common good and the immigrant human being, restate and question the forms of political participation of immigrants, the debate on their participation and integration and migration policies. Likewise, it evidences the role of unconventional political participation, particularly of the community, associationism and political action through ICTs in the citizenship of immigrants, taking political participation beyond the electoral and national territory. In turn, a hybrid transnational citizenship is being built, which facilitates the exercise of rights and communication, giving rise to a digital transnational citizenship. At the same time, it leaves open the debate on the full political integration of immigrants.

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# Dynamics of Violence in Unaccompanied Childhood and Adolescence in Migration Contexts\*

[English version]

Dinámicas de violencia en la infancia y la adolescencia  
no acompañada en contextos de migración

Dinâmicas de violência na infância e na adolescência  
não acompanhada em contextos de migração

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## Abstract

**Objective:** This paper shows the violence faced by unaccompanied migrant children and adolescents in Mexico, a matter that influences their recruitment by organized crime. It is based on the question: What circumstances expose unaccompanied minors to be recruited into organized crime? Practices and features of this sector and what makes it a vulnerable group to multiple violence are identified. **Methodology:**

The analysis of national and international documentary sources was used to realize about the violence faced by unaccompanied migrant children; as well as what they experience when they are recruited by criminal groups during their journey. **Results:** The vulnerability of unaccompanied children benefits the incorporation and recruitment into criminal groups, either because of their need for survival, the vulnerability generated by displacement or as an apparent means to achieve a better life. **Conclusions:** It is

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shown that unaccompanied migrant children are victims of multiple types of violence which represents a lot of opportunities for organized crime and the omissions of the State to guarantee the fulfillment of their rights during their transit through the country.

**Key words:** migration; organized crime; violence, childhood; adolescence (obtained from the UNESCO Thesaurus).

## Resumen

**Objetivo:** el presente artículo muestra la violencia que enfrentan niñas, niños y adolescentes (NNA) migrantes no acompañados en México, aspecto que influye en su reclutamiento por el crimen organizado. Se parte de la pregunta: ¿Cuáles son las situaciones que hacen que NNA no acompañados se vean expuestos a integrarse al crimen organizado? Se identifican prácticas y características que presenta este sector y que lo hacen constituirse en un grupo vulnerable a múltiples violencias. **Metodología:** se recurrió al análisis de fuentes documentales nacionales e internacionales que dieran cuenta de la violencia que enfrentan NNA migrantes no acompañados; así como de la dinámica que experimentan cuando son reclutados por grupos delincuenciales durante su trayecto. **Resultados:** la vulnerabilidad recursiva de NNA no acompañados opera a favor de la incorporación y reclutamiento en grupos delictivos, ya sea por la necesidad de supervivencia, la vulnerabilidad generada por el desplazamiento o como un aparente medio para alcanzar un mejor nivel de vida. **Conclusiones:** se muestra que NNA migrantes no acompañados son víctimas de una multiplicidad de violencias lo que constituye una cadena de oportunidades para el crimen organizado a lo que se suma las omisiones del Estado para garantizar el cumplimiento de sus derechos durante su tránsito por el país.

**Palabras clave:** migración; crimen organizado; violencia, niñez; adolescencia (obtenidos del Tesoro UNESCO).

## Resumo

**Objetivo:** O presente artigo apresenta a violência enfrentada por meninas, meninos e adolescentes migrantes não acompanhados no México, aspecto que influencia seu recrutamento pelo crime organizado. Parte-se da pergunta: Quais são as situações que fazem com que MNA não acompanhados se vejam expostos a integrar o crime organizado? São identificadas práticas e características apresentadas por esse setor, que o tornam um grupo vulnerável a múltiplas violências. **Metodologia:** Recorreu-se

à análise de fontes documentais nacionais e internacionais que relataram a violência enfrentada por meninas, meninos e adolescentes migrantes não acompanhados, bem como à dinâmica que experienciam quando são recrutados por grupos criminosos durante seu trajeto. **Resultados:** A vulnerabilidade recursiva dos meninas, meninos e adolescentes não acompanhados opera a favor da incorporação e do recrutamento em grupos criminosos, seja por necessidade de sobrevivência, pela vulnerabilidade gerada pelo deslocamento ou como um aparente meio de alcançar um melhor nível de vida. **Conclusões:** Mostra-se que os meninas, meninos e adolescentes migrantes não acompanhados são vítimas de uma multiplicidade de violências, o que constitui uma cadeia de oportunidades para o crime organizado, somada às omissões do Estado para garantir o cumprimento de seus direitos durante seu trânsito pelo país.

**Palavras-chave:** migração; crime organizado; violência; infância; adolescência (obtidos do Tesouro UNESCO).

## Introduction

Nowadays, Mexico faces a security crisis that highlights the rebound in several illegal activities such as trafficking in persons, trafficking in drugs, illegal goods and weapons, armed robbery, money laundering and the increase in criminal activities of organized crime, and expansion of different ways of violence in Mexico. One of the actions that mainly draws attention, and that turns out to be highly worrying, is the recent recruitment of unaccompanied<sup>1</sup> migrant children and adolescents into organized crime (Vélez et al., 2021).

However, despite these cases are known, as mentioned in the *Recruitment and Use of Children and Adolescents by Criminal Groups Report*, so far there is no in-depth diagnosis of this problem to widely understand the phenomenon and provide an institutional response (Vélez et al., 2021).

Ortega (2022) states that, according to the *Global Report in 2017: Internal Displacement Monitoring Center* (IDMC), the increase in violence caused by organized crime and military actions in the fight against drug trafficking have been the main causes of displacement of thousands of people (National Commission for Human Rights and Humanities Coordination, National Autonomous University of Mexico 2019). The author specifically points that organized crime carries out illegal acts through the threat, subordination and violation of the human rights of migrants and their families, since they can attack and even kill them as a way of forcibly into organized crime, both children and adolescents and adults. Recently, the *Global Report on Internal Displacement*, IDMC (2024), states that displacement in Mexico has increased significantly since it was registered in 2009:

Mexico recorded 11,000 displacements associated with conflict and violence in 2023, 20% more from 2022 but still below the decennial average. Chiapas was the most affected state for clashes between Jalisco New Generation Cartel and Sinaloa Cartel. Historically, both groups have fought for their strongholds in the northern states, but they have expanded their influence throughout Mexico and Guatemala as Chiapas shares a border. The biggest war displacement occurrence in Mexico in 2023 took place in Comalapa, near the Guatemalan border, from May 21 to May 26. About 392,000 people were displaced because the conflict and violence in Mexico<sup>2</sup>. (GRID, 2024, p. 90).

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1 *Youth Policy* (2003) states that children are minors up to the age of 11. Adolescents are those minors who are between 12 and 18 years of age.

2 Own translation

## Background on the Incorporation and Growth of Children and Adolescents in Organized Crime

Some events of the growth and incorporation of children and adolescents into organized crime can be seen in Valentina Glockner in the state of Guerrero. According to Glockner (2008), the level of marginalization in the region, lack of employment and social inequality have fostered the emergence and growth of drug trafficking and poppy cultivation. The author states that for those years

[...] many of the Mixtec children, boys, mainly, [already knew] are aware of or have already learned about the plantation and harvest of [poppy] the raw material from this flower, or they know the way it is shipped (p. 154).

The author states that some Mixtec families get 500 pesos on average for sowing and collecting raw material for the production of opium and morphine. In this context, many Mixtec children were involved without knowing what planting, caring for the crop and harvesting the poppy meant. Additionally, the author claims that neither they nor their families have real economic options to have a dignified life. Thus, for children and adolescents there were only three paths: planting poppies and/or marijuana, migrating to the United States from a young age or being a day laborer.

In 2015, *Violence, Children and Organized Crime Report of the Inter-American Commission on Human Rights* (IACHR, 2015) warned that:

[...] drug trafficking networks and criminal organizations dedicated to illegal activities in the country use and exploit children and adolescents, such as in intelligence and surveillance actions, production, transfer and sale of drugs, assassination, extortion actions, robberies, kidnappings, and sexual exploitation, among others (p. 70).

It also reports that this situation has led to children and adolescents, especially in poor urban areas and in the context of mobility, to be recruited by organized crime. The research also states that, due to the complexity of the phenomenon, there are no exact and reliable figures on the number of children and adolescents who have been into these criminal groups, and that about half of their members were minors (IACHR, 2015).

IACHR<sup>3</sup> (2015) reported that thirty thousand children and adolescents under the age of 18 had been recruited by criminal groups in Mexico. The participation

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3 The information presented is derived from the Office of the United Nations High Commissioner for

of organized groups engaged in criminal activities has become a daily situation in the lives of many people, mainly in children and adolescents, the most vulnerable unaccompanied migrant children and adolescents.

Committee on the Rights of the Child defines unaccompanied or solo migrant children and adolescents as “unaccompanied children” or “unaccompanied minors”. According to this concept, in Article 1 of the Convention on the Rights of the Child, they are those children who are separated from both parents and other relatives, and they are cared or supervised by an adult by law or custom, such care corresponds (CRC, General Comment no. 6, number 3, 2005).

Many of these unaccompanied children may be victims, for example, of extortion by other migrants, Mexican government authorities or some guides or coyotes who carry out the procedures to enter the United States. They also face trafficking in persons, assaults, kidnappings, and several assaults that put their lives at risk. In most migration events, violence by armed groups is observed as a direct cause of migration (Mexican Commission for the Defense and Promotion of Human Rights —CMDPH—, 2017, p. 12).

In these criminal organizations, children are used and/or abused. Members of these criminal groups consider them “[...] expendable and interchangeable pieces, the last link in the chain, and usually entrust them with activities of greater risk to their personal integrity” (IACHR, 2015, p. 14). This explains why organized crime has hierarchical structures, strict discipline, and many rules of discretion to achieve its criminal goals.

In case of disobedience to the rules and orders of heads of the group, they are punished violently or they can be executed if someone wants to leave the group (IACHR, 2015). In this scenario, the migratory flow becomes an ideal source for the recruitment of people, especially because of the vulnerability of migrants and mainly unaccompanied children and adolescents (Reinserta, 2021).

## **Migration, Violence and Victimization against Unaccompanied Children and Adolescents**

In relation to the rates of violence against children, CRC (2015) states that there is a diversity of illegal activities by organized crime that focuses on children and

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Refugees (UNHCR): Children on the Run. Unaccompanied children fleeing Central America and Mexico and the need for international protection. Individual interviews were conducted with 404 unaccompanied or separated children — approximately 100 from each country: El Salvador, Honduras, Guatemala, and Mexico — who arrived in the United States during or after October 2011.

adolescents; they are the main victims, since they take advantage of their condition of vulnerability. Unfortunately, these criminal organizations are increasingly beginning to build parallel social, political and economic structures, in the face of a weak or failed state (Guerrero, 2021).

It is explained by the ability to establish parallel informal socio-economic systems that replace state institutions. This allows each criminal group to exercise control over its supposed territory and its inhabitants. Members of these groups become leaders in their communities, for example, they participate in donating groceries, provide basic services; even in aspects of community safety or in keeping standards of behavior of the population in contexts of insecurity, poverty and marginalization and, of course, of a weak system of procurement and delivery of justice (Guerrero, 2021; Badillo, 2020).

The unaccompanied and transiting migrant child and adolescent population, as well as those originating from territories where organized crime is active, it becomes as a prolific field to be linked or recruited to criminal gangs (OHCHR, 2022). IACHR (2015) reports that they are recruited in "[...] criminal organizations from 10 or 11 years, or even younger [...] to work for traffickers, either of illegal products (drugs or weapons) or of people (body packers) [...] as to carry out assaults, aggressions and kidnappings" (p. 71).

"Recruitment" is understood as the permanent process of incorporation into organized crime to carry out several illegal activities, as theft, recruitment, threat, intimidation, kidnapping, deception, force use or other ways of coercion, offer of payment or benefits, among others. There are two basic types of recruitment: forced and unforced (Onprenna, 2022).

Some other approaches on the number of children and adolescents who have been recruited by organized crime are those conducted in 2011 by *Network for the Rights of Children in Mexico* (Redim), state that thirty-five thousand children were part of organized criminal groups, five thousand more than IACHR. In 2018, Mexican authorities estimated that there were around 460,000 children and adolescents working in these organized criminal groups. These figures issued by each source highlight the differences between data, also show the absence of monitoring over time (Reinserta, 2021).

On the other hand, *Dangers for Children Index. Indicators for Mexico* (2018), reported by the non-governmental organization *Save the Children*, states that violence threatens children through homicides and displacements by violence, since these build "[...] the maximum expression of violence against children and adolescents" (Save the Children, 2018, p. 7). This Index shows that in the six-year periods (2001-2006) and (2007-2012), the number of deaths of adolescents by homicide between 15 and 19 years old doubled from 871 homicides to 1,743 respectively, throughout the second six-year period. During 2014 to



2015, homicides among those between the ages of 15 and 17 increased by 3.8%. These data are linked to the increase in violence rates in our country as a result of organized crime, and in some violent actions is also by the State itself (Save the Children, 2018).

Mexico does not have official data on the number of child victims of recruitment by criminal groups. This makes more difficult the analysis of this situation because the risks in its measurement and monitoring. However, the lack of precise data to analyze this social problem over time and the need to recognize the importance of the seriousness of the recruitment of children by criminal groups, the National Citizen Observatory and the Network for the Rights of Children in Mexico (2021) proposed a rigorous methodology based on available official information in the report *Recruitment and Use of Children and Adolescents by Criminal Groups*,

The explanatory model of these results is based on Vanessa Bouché (2017) in *An Empirical Analysis of the Intersection of Organized Crime and Human Trafficking in the United States*. In this research, the characteristics of criminal groups and their scope are studied. A typology was generated to analyze human trafficking, the one that is considered for the current research, but is conducted to the analysis of the recruitment and use of children and adolescents. This methodology proposes a "5-S" typology (*size, scope, structure, sophistication and self-identification*), it shows differences and similarities in five criminal groups of human trafficking, and the attributes of each of them. These are the variables for the statistical analysis: number of minor victims (0-17 years old) of intentional homicide, femicide, kidnapping, extortion and trafficking in persons, number of missing and unaccounted for persons (0-17 years old), number of persons (0-17 years old) with injuries by type of violence (physical violence; sexual violence; psychological violence; economic/patrimonial violence and abandonment and/or neglect), number of adolescents in treatment centers (people in jail), number of people in antisocial behaviors (accused adolescents), and number of people involved in antisocial behaviors (adolescent victims of crimes), among other aspects.

As a result, many children and teenagers are vulnerable for being recruited by criminal organizations. In this regard, the following data is reported by federal entity:

**Table 1.** *Distribution of the Population of Vulnerable Children and Adolescents by State, 2015.*

	Children and Teenagers			Participation in the National Population of Children and Adolescents (%)			Percentage of State Populations of Children and Adolescent
	0-17 years	5 to 17 years	Vulnerable	0-17 years	5 to 17 years	Vulnerable	Vulnerable
Aguascalientes	469,728	344,760	44,293	1.2	1.2	1.1	9.4
Baja California	1,080,357	806,052	112,238	2.8	2.8	2.8	10.4
Baja California Sur	240,054	175,978	18,290	0.6	0.6	0.5	7.6
Campeche	288,796	210,383	27,607	0.8	0.7	0.7	9.6
Coahuila de Zaragoza	981,833	700,480	90,207	2.6	2.5	2.3	9.2
Colima	211,064	157,615	23,867	0.5	0.6	0.6	11.3
Chiapas	2,115,015	1,528,775	301,617	5.5	5.4	7.6	14.3
Chihuahua	1,156,219	858,596	121,558	3.0	3.0	3.1	10.5
Mexico City	2,041,722	1,558,335	178,302	5.3	5.5	4.5	8.7
Durango	619,335	451,086	59,628	1.6	1.6	1.5	9.6
Guanajuato	1,998,454	1,452,883	242,191	5.2	5.1	6.1	12.1
Guerrero	1,240,970	902,380	132,639	3.2	3.2	3.3	10.7
Hidalgo	960,335	721,496	78,762	2.5	2.5	2.0	8.2
Jalisco	2,555,156	1,877,897	309,736	6.7	6.6	7.8	12.1
Mexico	5,017,775	3,737,463	455,218	13.1	13.2	11.4	9.1
Michoacán de Ocampo	1,529,247	1,099,374	196,999	4.0	3.9	5.0	12.9
Morelos	567,180	422,322	60,668	1.5	1.5	1.5	10.7
Nayarit	396,619	294,110	40,237	1.0	1.0	1.0	10.1
Nuevo León	1,653,408	1,200,280	149,085	4.3	4.2	3.7	9.0
Oaxaca	1,364,952	1,003,398	144,834	3.6	3.5	3.6	10.6
Puebla	2,168,581	1,581,460	230,594	5.6	5.6	5.8	10.6
Querétaro	701,691	516,398	71,463	1.8	1.8	1.8	10.2
Quintana Roo	560,611	409,759	56,741	1.5	1.4	1.4	10.1

	Children and Teenagers			Participation in the National Population of Children and Adolescents (%)			Percentage of State Populations of Children and Adolescent
	0-17 years	5 to 17 years	Vulnerable	0-17 years	5 to 17 years	Vulnerable	Vulnerable
San Luis Potosí	880,659	650,730	87,820	2.3	2.3	2.2	10.0
Sinaloa	894,078	658,947	76,880	2.3	2.3	1.9	8.6
Sonora	876,755	656,100	87,964	2.3	2.3	2.2	10.0
Tabasco	771,892	563,107	62,335	2.0	2.0	1.6	8.1
Tamaulipas	1,044,155	770,371	101,934	2.7	2.7	2.6	9.8
Tlaxcala	428,132	315,737	36,921	1.1	1.1	0.9	8.6
Veracruz de Ignacio de la Llave	2,389,508	1,787,456	263,944	6.2	6.3	6.6	11.0
Yucatán	670,177	496,413	57,709	1.7	1.8	1.5	8.6
Zacatecas	546,733	393,530	55,133	1.4	1.4	1.4	10.1
	38,421,191	28,303,671	3,977,414	100	100	100	10.4

Source: National Citizen Observatory and Network for the Rights of Children in Mexico (2021). *Recruitment and use of children and adolescents by criminal groups. Data from the 2020 Census Sample, INEGI.*

**Table 2.** *Distribution of the Population of Vulnerable Children and Adolescents by State, 2015.*

	Children and Adolescents in a Situation of Threat	Participation in the National (%)	Percentage of Children and Adolescents Under Threat Out of the Total Number of Vulnerable
Baja California	15,554	2.0	13.9
Baja California Sur	2,633	0.3	14.4
Campeche	6,254	0.8	22.7
Coahuila de Zaragoza	11,270	1.4	12.5
Colima	4,206	0.5	17.6
Chiapas	64,473	8.1	21.4

	Children and Adolescents in a Situation of Threat	Participation in the National (%)	Percentage of Children and Adolescents Under Threat Out of the Total Number of Vulnerable
Chihuahua	17,246	2.2	14.2
Mexico City	22,396	2.8	12.6
Durango	11,582	1.5	19.4
Guanajuato	58,020	7.3	24.0
Guerrero	27,232	3.4	20.5
Hidalgo	18,639	2.3	23.7
Jalisco	68,196	8.6	22.0
Mexico	76,771	9.7	16.9
Michoacán de Ocampo	51,799	6.5	26.3
Morelos	13,593	1.7	22.4
Nayarit	7,616	1.0	18.9
Nuevo León	24,224	3.1	16.2
Oaxaca	36,244	4.6	25.0
Puebla	62,034	7.8	26.9
Querétaro	14,158	1.8	19.8
Quintana Roo	8,167	1.0	14.4
San Luis Potosí	19,519	2.5	22.2
Sinaloa	13,520	1.7	17.6
Sonora	11,986	1.5	13.6
Tabasco	9,455	1.2	15.2
Tamaulipas	14,468	1.8	14.2
Tlaxcala	8,173	1.0	22.1
Veracruz de Ignacio de la Llave	57,245	7.2	21.7
Yucatán	14,291	1.8	24.8
Zacatecas	12,012	1.5	21.8

Source: National Citizen Observatory and Network for the Rights of Children in Mexico (2021). *Recruitment and use of children and adolescents by criminal groups. Data from the 2020 Census Sample, INEGI.*

**Table 3.** *Distribution of the Population of Vulnerable Children and Adolescents by State, 2015.*

	% of Vulnerable Population				
	Children and Adolescents in a Situation of Threat	Children and Adolescents at Risk (1)	Children and Adolescents at Risk (2)	Children and Adolescents at Risk (1)	Girls, Boys and Adolescents at Risk (2)
Aguascalientes	11,042	3,485	2,014	7.9	4.5
Baja California	15,554	4,908	2,837	4.4	2.5
Baja California Sur	2,633	831	480	4.5	2.6
Campeche	6,254	1,974	1,141	7.1	4.1
Coahuila de Zaragoza	11,270	3,557	2,056	3.9	2.3
Colima	4,206	1,327	767	5.6	3.2
Chiapas	64,473	20,346	11,762	6.7	3.9
Chihuahua	17,246	5,442	3,146	4.5	2.6
Mexico City	22,396	7,068	4,086	4.0	2.3
Durango	11,582	3,655	2,113	6.1	3.5
Guanajuato	58,020	18,310	10,584	7.6	4.4
Guerrero	27,232	8,594	4,968	6.5	3.7
Hidalgo	18,639	5,882	3,400	7.5	4.3
Jalisco	68,196	21,521	12,441	6.9	4.0
Mexico	76,771	24,227	14,005	5.3	3.1
Michoacán de Ocampo	51,799	16,347	9,450	8.3	4.8
Morelos	13,593	4,290	2,480	7.1	4.1

	% of Vulnerable Population				
	Children and Adolescents in a Situation of Threat	Children and Adolescents at Risk (1)	Children and Adolescents at Risk (2)	Children and Adolescents at Risk (1)	Girls, Boys and Adolescents at Risk (2)
Nayarit	7,616	2,403	1,389	6.0	3.5
Nuevo León	24,224	7,645	4,419	5.1	3.0
Oaxaca	36,244	11,438	6,612	7.9	4.6
Puebla	62,034	19,577	11,317	8.5	4.9
Querétaro	14,158	4,468	2,583	6.3	3.6
Quintana Roo	8,167	2,577	1,490	4.5	2.6
San Luis Potosí	19,519	6,160	3,561	7.0	4.1
Sinaloa	13,520	4,267	2,466	5.5	3.2
Sonora	11,986	3,783	2,187	4.3	2.5
Tabasco	9,455	2,984	1,725	4.8	2.8
Tamaulipas	14,468	4,566	2,639	4.5	2.6
Tlaxcala	8,173	2,579	1,491	7.0	4.0
Veracruz de Ignacio de la Llave	57,245	18,065	10,443	6.8	4.0
Yucatán	14,291	4,510	2,607	7.8	4.5
Zacatecas	12,012	3,791	2,191	6.9	4.0
	794,018	250,574	144,851	6.3	3.6

Source: National Citizen Observatory and Network for the Rights of Children in Mexico (2021). *Recruitment and use of children and adolescents by criminal groups*. Data from the 2020 Census Sample, INEGI

From the data analysis, the following results highlight the presence of organized crime in the life of children and adolescents:

4 million children and adolescents between of 5 and 17 are in a vulnerable situation of [being] recruited or used by criminal groups [...] it was found that one of five of these children and adolescents (794 thousand) is mainly threatened by not attending school and working simultaneously [...] it was found that between 145 thousand and 250 thousand children and adolescents are at risk of being recruited or used by some criminal group throughout the country (Vélez et al., 2021, p. 94).

Thus, the dynamics of violence in daily life has a negative impact on the lives of children and adolescents, mainly on those who are unaccompanied migrant children, as their development and their own lives are at risk. It has been identified that criminal gangs use children and adolescents to a greater extent to commit crimes due to the absence of sufficiently severe penalties against them, and that the punishments they face do not correspond to the seriousness of their acts (National Law on the Comprehensive Criminal Justice System for Adolescents, 2022).

In addition, violence has intensified and is mainly observed in the number of homicides. In this regard, the population of adolescents and young people have the highest percentages of violence (Onprena, 2022). Men from marginalized groups and in high vulnerability or recursive vulnerability the ones with a greater number of cases reported in children and adolescents' contexts of mobility.

## **Poverty and Marginalization: Conditions of Childhood and Adolescence in Mexico**

In their *paper Attraction or recruitment? Causes that motivate the entry into the gangs of Salvadoran adolescents*, Martínez and Navarro (2018) state that poverty is not the determining factor nor the main cause for unaccompanied migrant children to enter gangs or organized crime groups. However, a pattern of behavior is distinguished in which most members of criminal groups come from marginalization and are disadvantaged by recursive vulnerability.

The emergence and configurations of these groups is more likely in areas of high vulnerability. These criminal groups fill the gap in communities that are abandoned by governments and have few social and economic resources. Unfortunately, they have emerged as major employers of adolescents without educational and employment opportunities. Prieto et al. (2023) mention that together the cartels in Mexico are the fifth largest employer after Femsa, Walmart, Manpower and América Móvil, with 175 thousand employees.

Fuentes and Arellano (2022), in the *Index of Children's Rights*, state that the National Council for the Evaluation of Social Development Policy (Coneval) estimated, from the 2020 Population and Housing Census of the National Institute of Statistics and Geography (INEGI), that there would be around 126 74 million people in Mexico. Of these, 55.6 million were considered poor and, relatively, represented 43.9% of the national population. They mention that the increase in poverty (Coneval, 2020) affects children more intensely and deeply than other population groups. According to UNICEF, some of the factors that influence this population to migrate are mainly: poverty, violence related to organized crime, lack of educational opportunities and reunification with their family in the destination country (UNICEF, 2023).

To this conflictive context and the high levels of exposure to violence and mobility of migrant children under 12 years of age, increased significantly from 4,985 children in 2020 to 32,309 in 2021 (Save the Children, 2021). According to Forbes (2021), the United States Customs and Border Protection Office in 2021 more than 160,000 adolescent children from Mexico, and from three countries in northern Central America (El Salvador, Guatemala and Honduras), arrived unaccompanied in the United States (Forbes, 2021).

Fuentes and Arellano (2022) state that:

[...] it is the child population that faces the worst conditions of deprivation, but also in greater proportions. Indeed, if 52.6% of children and adolescents in the country in 2020 were considered poor, in the group from zero to five years the incidence was 54.3% (p. 69).

The indicator that is most regularly used to approximate the conditions of violence in a country is intentional homicide. They highlight that, between 2016 and June 2021, INEGI reported that 7,752 children and adolescents between 0 and 17 had lost their lives for injuries caused intentionally. The authors go deeper

[...] in order to carry out an appropriate comparison, the mortality rate for intentional homicide from zero to 17 years was estimated using the population projections of Conapo [National Population Council] for 2016-2020 [...] the national average was 3.6 murders per 100,000 (people) in the age group. To measure what this figure represents, the homicide rate of children under 18 years of age is 2.76 times higher than the average rate of femicides for the same period. According to the Executive Secretariat of the National Public Security System (SESNSP), is 1.3 victims per 100,000 women. This comparison is relevant because, in absolute numbers, the daily average of femicides is approximately



three victims, while children and adolescents are 3.9 (Fuentes & Arellano, 2022, p. 79).

The high rate of crime against this demographic inside the country is certainly represented by the 3.9 murder rate for children and adolescents. This demonstrates how urgent it is to fight on behalf of this vulnerable group to stop violence against children and the unaccompanied migrant population from joining organized crime. The conditions of inequality, social exclusion and lack of opportunities, and insecurity and daily violence can to some extent favor the phenomenon of recruitment by organized crime in Mexico (CNDH, UNAM and Coordinación de Humanidades, 2019).

In childhood and adolescence in situations of unaccompanied migration, coupled with the violence in several ways, it is also important to consider the condition of victims who have not been provided with the necessary protection according to their age and development, which guarantees the respect and fulfillment of their human rights (Fuentes et al., 2015).

Pérez (2023) states that unaccompanied migrant children and adolescents suffer different violations of their human rights, mainly caused by discrimination and recursive vulnerability they daily face<sup>4</sup>. According to the author, "[...] every act of discrimination implies in itself an act of violence in any of its verbal, physical, psycho-emotional, sexual, social, cultural and political ways" (p. 95), among others. Thus, the author points out that there will always be "[...] effective violations of human rights and fundamental freedoms" (p. 96).

## **Worsening Conditions of Vulnerability in Unaccompanied migrant children and adolescents**

The growth and strength of organized crime in recent years has exacerbated the conditions of vulnerability in unaccompanied migrant children. Children suffer violence and abuse in all settings and lack educational alternatives that allow them a better quality of life (Save the Children, 2021).

The lack of opportunities for children and adolescents to develop an autonomous life project is directly related to the structural situations of socioeconomic exclusion and discrimination that Mexico has failed to reverse. They also face obstacles to effectively and completely exercise their human rights. According

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4 Discrimination means: select excluding, it means, giving inferior treatment to people or groups, because of their ethnic or national origin, religion, age, gender, opinions, political and sexual preferences, health conditions, disabilities, marital status or other cause (National Human Rights Commission, 2012, pp. 5 [6].

to the Inter-American Commission on Human Rights (IACHR, 2015), violence in childhood and adolescence, migration and the articulation of organized crime, have become the main cause of death in adolescent men in Latin America and the Caribbean, and Mexico is not the exception.

The activities carried out by organized crime are diverse: drug trafficking, but also the theft of raw materials, piracy, car theft or human trafficking (United Nations, 2004, Art. 3). Most people recruited for organized crime are vulnerable and marginalized. This is linked to national and transnational public and private power. These criminal gangs recruit people by force to achieve their goals and generally use children and adolescents because they are easier to persuade and confuse than adults.

Two dimensions are observed on how children and adolescents were mainly recruited: 1) as victims of non-voluntary recruitment, that is, through threats and coercion; and 2) as participants, voluntary or not, in the illegal activities that they are instructed to carry out. The absence of ethical, fair and honest figures and leadership, the gang or criminal groups offer the possibility to find the identity and belonging that the young person, adolescents or children do not find in their family, school or community environment (Ballesteros et al., 2002).

Criminal groups offer the possibility to find protection, companion, relative safety and belonging to a group. In some communities with gangs or criminal groups, joining one of these becomes almost a necessity to survive, mainly in contexts with high levels of violence, marginalization, poverty and social inequality. The gang offers a sense of belonging and access to resources that sometimes do not exist at home or family of origin.

To be a member of a gang becomes a part of identity, social recognition and power through criminal activities. Moreover, sometimes there is no full awareness from children and adolescents of what their participation in these criminal groups mean (Ballesteros et al., 2002).

One of the crimes faced mainly by children and adolescents in a situation of unaccompanied migration is trafficking in persons, as part of the crimes from organized crime. Human trafficking constitutes a way of extreme violence because the victims are stripped of their humanity by being reduced to simple objects of use, change and consumption. This is at the end of a scale of violence that precedes and facilitates it (World Bank, 2023).

Human trafficking is a crime that contributes greatly to the fracturing of communities, since they damage the social fabric, violate and corrupt institutions and generate violence that cause pain, destruction and death to those who suffer from them (World Bank, 2023).

Glockner (2019) clearly presents this situation and mentions that children who travel through the Andean Region, from Central America or from Mexico to

move along the corridor to the United States, experience great challenges, risks and violence: diseases, unsanitary conditions, hunger, various types of violence, abuses of power, accidents, rapes, torture, physical abuse, kidnappings or human trafficking. They are also exposed to crimes such as child prostitution, child sex tourism, child pornography, child labor, murder, disappearance, labor exploitation, begging, servitude, analogous slavery and forced marriage and recruitment of criminal groups, among others (Pérez, 2023).

The routes travelled by migrants, air, sea, land or both- involve facing multiple ways of violence:

[...] perpetrated to a different degree and intensity by the actors operating along this transit zone: to the point that Mexico-USA corridor has become a truly violent preliminary border or "human wall of violence". (Glockner, 2019, p. 53).

## **Human Rights and Victimization of Unaccompanied Migrant Children**

Unaccompanied migrant children in situation of illegality, live a different situation that affect and limit the enjoyment and exercise of their human rights (Pérez, 2023), mainly to the right to a life free of violence and, consequently, their quality of life and integral development. It means the fundamental freedoms and human rights that people must be guaranteed regardless of their immigration status. The right to a life free of violence is mainly distinguished among them, it represents itself in its transit with serious repercussions for its development, security, and of course, its own life. Unfortunately, unaccompanied migrant children and adolescents fall directly into several ways of violence, especially, if they are not with their parents or an adult. Some children and adolescents travel accompanied by their families or alone, which adds one more condition to the vulnerability they experience on a day-to-day basis. According to De la Cruz and Núñez (2018) "[...] in 2015, 170 thousand migrants were detained in the national territory, around 24 thousand were unaccompanied children and adolescents" (p. 2).

As they are children, they are more vulnerable and have less possibility of knowing, recognizing and defending themselves, it makes them almost impossible to demand exercise and enjoyment of their human rights, and the ability to make them justiciable.

According to the *Declaration of Human Rights*, the principle of equality and non-discrimination of any event that jeopardizes the enjoyment and exercise of

their human rights and freedoms implies the condition of equality for children and adolescents, without any distinction based on race, genre, age, language, religion, beliefs, culture, political opinion, economic situation, social, ethnic or national origin, disability, illness, birth or any other condition (CRC, 2013, General Comment No. 14). An aspect closely linked to the need to ensure the best interests of the child, as it is a central aspect in all measures concerning childhood. This in:

their relative immaturity, young children are reliant on responsible authorities to assess and represent their rights and best interests in relation to decisions and actions that affect their well-being, while taking account of their views and evolving capacities (Pérez, 2023, p. 26).

This principle must be applied to all measures affecting children and demands concrete and effective provisions to protect their rights and promote their development, survival, growth and well-being. Parents or other people responsible for fulfillment of the rights of children and adolescents should be assisted (CRC, 2005, General Comment No. 7).

## Conclusions

The migration of unaccompanied children and adolescents certainly represents the most dramatic and paradigmatic way of social exclusion and subordination of a highly vulnerable group for the age and the helplessness, its exposures violent local, regional and global power structures of subordination and exclusion. Although there is some progress in legislation to protect human rights at the international level, and in the region of the Americas in favor of the protection of the rights of unaccompanied migrant children, the necessary progress has not been fully achieved to eradicate violence and discrimination still related to age, personal, social, economic, migratory and, in many cases, family conditions or recursive vulnerability.

An aspect that would definitely influence the situation of unaccompanied migrant children and their integration with criminal groups in a positive and preventive sense is to invest in them, it is not only an obligation but a legal, ethical and political necessity. It implies the recognition of their human dignity to provide them with better conditions in their development and in the fight against all ways of violence, and the best ways to prioritize them in the public and political agenda. If not fulfilled, it places this population in a condition of

extreme marginalization. It has to do with a lack of access to justice, and to the fulfillment and protection of their human rights.

The interdependence between human rights demands to promote measures by the State, its actors and members of society so that unaccompanied migrant children and adolescents are guaranteed their human rights and have access to food, clothing, health, education and housing and, above all, that they allow the development of a dignified life, since their lack of access to it affects their physical, psychological, social and emotional development, among other aspects. Children and adolescents must be protected from any behavior, act or omission that endangers their lives or limit them of it.

It is also important to generate data on children and adolescents in a situation of unaccompanied migration that shows the priority of creating new migration policies and public programs from the perspective of children's rights, to protect the fulfillment of their human rights and mainly to guarantee the best interest.

Taking into account this current context and the conditions of vulnerability of this population, it is necessary to deepen and develop research that allows us to know in detail and more specific way the association of unaccompanied migrant children and adolescents with organized crime. It is mandatory to document this information with updated data from several statistical, bibliographic and hemerographic sources, to identify the main factors and patterns of behavior by organized crime that influence unaccompanied migrant children and adolescents to end up being recruited. This to provide effective and lasting responses to this problem, and inhibit these types of actions of organized crime that put them at risk.

It is important to study, analyze, monitor and/or create protocols for prevention, care, guidance and repair of harm to provide care for the needs of unaccompanied migrant children. Moreover, it is necessary to deepen the sources of information, and improve the indicators for the measurement and development of statistical databases that allow in-depth knowledge of the subject. To this, institutional actions must be added and reinforced for the protection of migrant children and adolescents and, mainly, for the unaccompanied ones. To generate public policies and effective mechanisms for the comprehensive protection and prevention of violence, and to prevent unaccompanied migrant children from facing several situations that violate their healthy development and put their lives, their best interests, the guarantee and fulfillment of their human rights.

This would not be complete if a solid institutional training campaign is not promoted and carried out to provide care and develop tools to care for children and adolescents who are victims of the recruitment of organized crime groups. Not

to revictimize them, and to prevent risks and develop skills in public personnel to identify and address violence against unaccompanied migrant children.

Therefore, it is necessary to reflect on the importance of considering the context, life history, conditions, and circumstances in which these unaccompanied migrant children and adolescents who have already been captured by organized crime live, and who experience the "constellations of power" (Creswell cited by Glockner, 2019, p. 55). In this situation, they suffer abuse and are criminalized, even without their consent to perform illegal behaviors for necessity or when they have been forced, invited, induced or tricked by gangs or organized crime groups.

These institutional measures and those of civil society organizations must seek to guarantee the right to life and survival in this population. The first consists of the right not to be deprived of life, under any circumstances and without being interrupted by any person or external situation. This demands the duty of the State to protect them from actions or omissions of early or provoked death. The right to survival means that children and adolescents in mobility contexts enjoy conditions to access a dignified life and their social rights: health, food, clothing, housing, water and education, among others. In other words, the right to survival as a whole will have to provide children and adolescents with the conditions for their integral development and a life free of violence and without discrimination.

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# Educational Outcomes of Immigrant Children and Youth and Children of Immigrants in Mexico\*

[English Version]

Resultados educativos de niñas, niños y jóvenes inmigrantes e hijos de inmigrantes en México

Resultados educacionais de meninas, meninos e jovens imigrantes e filhos de imigrantes no México

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Mexico

## Abstract

**Objective:** The article compares the educational outcomes of immigrant children and youth in Mexico, including those who are part of generation 1.5 and generation 2.0 (born in Mexico to foreign parents), and generation 2.5 (born in Mexico to mixed-parentage unions where one parent is Mexican).

**Methodology:** A descriptive statistical analysis was conducted on the characteristics

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of children and youth aged 5 to 17 years, as well as their households and living contexts, using data from the Mexico Population and Housing Census 2020. **Results:** Gaps were identified in school attendance and educational lag based on the children's birthplace and their parents' country of origin (Mexico or another country), with fewer disadvantages observed among children from mixed (national and foreign) unions. **Conclusions:** In Mexico, education is compulsory up to upper secondary education. However, differences in school attendance and performance have been identified among the various migrant generation groups, ranging from primary to upper secondary education. This research offers a detailed exploration of the educational situation of immigrant children and children of immigrants and their integration processes into Mexico's educational system.

**Keywords:** school attendance; educational gap; immigration; migrant children and youth; Mexico (obtained from the ERIC thesaurus).

## Resumen

**Objetivo:** el artículo compara los resultados educativos de niños, niñas y jóvenes (NNJ) inmigrantes en México (generación 1.5) y aquellos nacidos en territorio mexicano con ascendencia migratoria, cuyos padres son extranjeros en México (generación 2.0) o hijas/os de uniones mixtas donde uno de los progenitores es mexicano (generación 2.5).

**Metodología:** se realiza un análisis estadístico descriptivo de las características de los NNJ de 5 a 17 años, sus hogares y el contexto donde viven, a partir de los datos del Censo de Población y Vivienda de México 2020. **Resultados:** se encontraron brechas en la asistencia y rezago escolar de los NNJ a partir de su lugar de nacimiento, al lugar de nacimiento de los padres (México u otro país), con menores desventajas entre aquellos menores provenientes de uniones mixtas (nacionales-extranjeros). **Conclusiones:** en México, la educación es obligatoria hasta la media superior, sin embargo, entre los distintos grupos de generaciones migrantes se han encontrado diferencias tanto en la asistencia como en el desempeño escolar, desde la educación primaria hasta la media superior. Este trabajo abre espacio para una exploración más detallada de la situación educativa de NNJ inmigrantes o hijos de inmigrantes, y su proceso de integración a la escuela en México.

**Palabras clave:** asistencia escolar; brecha educativa; inmigración; niñas, niños y jóvenes migrantes; México (obtenidos del tesoro ERIC).

## Resumo

**Objetivo:** O artigo compara os resultados educacionais de meninas, meninos e jovens (MMJ) imigrantes no México (geração 1.5) e daqueles nascidos em território mexicano com ascendência migratória, cujos pais são estrangeiros no México (geração 2.0) ou filhos de uniões mistas em que um dos progenitores é mexicano (geração 2.5).

**Metodologia:** Realiza-se uma análise estatística descritiva das características dos MMJ de 5 a 17 anos, de seus lares e do contexto em que vivem, com base nos dados do Censo de População e Habitação do México de 2020. **Resultados:** Foram identificadas disparidades na frequência escolar e no atraso educacional dos MMJ, considerando seu local de nascimento e o país de origem de seus pais (México ou outro país), com menores desvantagens entre aqueles provenientes de uniões mistas (nacionais-estrangeiros). **Conclusões:** No México, a educação é obrigatória até o ensino médio, no entanto, entre os diferentes grupos de gerações migrantes, observam-se diferenças tanto na frequência quanto no desempenho escolar, desde o ensino fundamental até o ensino médio. Este estudo abre espaço para uma exploração mais detalhada da situação educacional dos MMJ imigrantes ou filhos de imigrantes e de seu processo de integração escolar no México.

**Palavras-chave:** frequência escolar; desigualdade educacional; imigração; meninas, meninos e jovens migrantes; México (obtidos do tesouro ERIC).

## Introduction

The various domains in which foreigners are integrated into their host contexts have been a focus of interest in migratory studies. Examining the integration experiences of migrants and a subsequent identification of the long-term consequences for first and second generations immigrant children was the initial focus (Portes & Hao, 2004). Analyzing the outcomes of migrant children and youth, and children of migrants in destination societies is associated with the long-term effects of immigration (Portes et al., 2009). While research in the United States and Europe has provided valuable insights on how migrants and their children integrate into work, family, and social and educational contexts in host countries, research in other arrival contexts is still scarce. Additionally, some particularities make the Mexican case one of interest.

Although Mexico plays a remarkable role as a country of emigration, it is a convergence country for other migration flows, including immigration. Although foreigners in Mexico represent a small percentage of the country's total population (1.0%, according to the 2020 population census, approximately 1.2 million people), recently, there has been a significant increase, primarily among individuals from Latin America and the Caribbean (Angoa & Giorguli, 2021).

Unlike other contexts, in terms of wages and economic integration, Central American (Meza & Pederzini, 2020; 2022) and Latin American (Navarrete-Suárez & Masferrer, 2022) migrants in Mexico achieve better outcomes compared to non-migrants; however, these advantages tend to decrease over time. Concerning birthplace, immigrants to Mexico born in countries other than the United States are more likely to work, while their Mexican counterparts continue in school (Escoto & Masferrer, 2021). Similarly, the context of migration reception exhibits a duality. On the one hand, it is inclusive in terms of national and international regulations, as evidenced by the country's participation in international agreements related to migrants. On the other hand, it is exclusionary in the development and implementation of public policies that discriminate against migrants, limiting their access to basic services and labor markets (Sánchez-Montijano, 2022).

The presence of foreign children, youth, and second-generation immigrants remains a rather underexplored area of immigration research in Mexico (Rodríguez, 2010). Education is a key focus because it serves as one of the first spaces of socialization for immigrant children and youth in the destination country and is an indicator of their future well-being (Suárez-Orozco & Suárez-Orozco, 2015). Furthermore, educational achievement has been a measure of the incorporation and integration of immigrants into destination societies (Kirui &

Kao, 2018). From this perspective, the objective is to analyze the participation of children and adolescents in the Mexican educational system and, through this lens, gain insights into the integration of both immigrant children and immigrant parents with Mexican-born children into Mexican society.

One of the challenges lies in the empirical conceptualization of first- and second-generation immigrants, considering the unique characteristics of migratory flows to, from, and through Mexico, as well as how children and youth engage with migration processes. Although theoretical, conceptual, and empirical frameworks in the United States have mainly guided how to refer to the first and second generations (Rumbaut, 2004), in different contexts, such as Mexico, these definitions still need to be reevaluated. According to Giorguli (2022), children and youth exposed to migration in Mexico can be classified into three main groups: (i) minors who remain in communities of origin affected by migration;<sup>1</sup> (ii) those who migrate, including emigrants to the United States, return migrants, children and youth born in the United States who migrate to Mexico and individuals from other countries who come to reside in Mexico; (iii) finally, second-generation children and youth residing in Mexico.

In this context, the proposed categories served two distinct purposes. The first delved into the conceptual classification groups between immigrants and their children (first and second generations) in Mexico.<sup>2</sup> The second analyzed the profiles of immigrant children and youth, and children of immigrants in Mexico, from quantifying the size of the cohort and, mainly, detailing their educational similarities and differences compared to non-migrant Mexican children and youth.<sup>3</sup> The second intention of this work is to determine the size of this population within the school population in Mexico and to provide an initial assessment of the challenges the Mexican educational system might face in ensuring their right to education.

The purpose is to examine specific aspects of immigration in Mexico, focusing on the demographic and family characteristics of migrant children and youth and the children of migrants (second generation). The inequalities in

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1 This group is made up of children and adolescents whose parents or relatives have migrated, received remittances, or have been in communities with a high migration incidence (Giorguli, 2022).

2 At the methodological level, a decision was made to not include girls, boys and young people born in Mexico and with return migration experience, given that the parents' place of birth is Mexico. Although the disadvantages in the educational outcomes of this group of return migrants have been widely documented, in Aguilar, 2014, 2021 among others; Aguilar & Jacobo, 2020; Camacho & Vargas-Valle, 2017; Vargas-Valle & Camacho, 2015; Zúñiga & Giorguli, 2019.

3 The differences between age groups (5-11, 12-14 15-17) and migrant generations (non-migrant, US-born, generation 1.5, 2.0, and 2.5) presented throughout the text are statistically significant.



their school integration processes, comparing the first and second generations of migrants with the non-migrant population, are also examined.

This is an initial approach to first and second generations of immigrants in Mexico. Using the most recent Mexico Population Census, this descriptive analysis highlights aspects related to the relationship between international migration, education, and mixed unions. These findings contribute to a deeper understanding of these issues in migration destination contexts that differ from those traditionally studied, such as the United States or Europe.

## **Education, International Migration, and Migrant Generations**

Education is recognized as a fundamental human right for children,<sup>4</sup> contributing to a holistic development of their cognitive, social-emotional, and physical capacities and preparing them for adult life (National Institute for the Evaluation of Education (INEE), 2019).

School attendance is a necessary condition to avoid educational lag and illiteracy. This has been associated with individual and family characteristics of children and youth, the size of their locality, the poverty conditions, and the degree of marginalization (INEE, 2019). The lack of attendance and the educational lag are greater in rural localities than urban localities (Solís, 2010). Regional inequalities in access to education prevail in Mexico, with more equitable conditions in the metropolitan area of the Valley of Mexico and the border states with the United States compared to the southern states, where the educational disparities are more pronounced (Favila & Navarro, 2017).

International migration is also considered in the analysis of educational inequality in Mexico, particularly concerning two populations of interest in this study. The first population comprises migrant children who move from one country to another, while the second population includes the children of immigrants. The first case involves a migration process at school age that can disrupt educational trajectories and require adaptation to new environments, potentially causing a late start of the school year or delays due to the compulsory administrative procedures (Suárez-Orozco et al., 2010). The second case comprises immigrant parents and their children who may face a lack of or limited information about accessing the educational system, as well as obstacles

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4 Ratified in article 26 of the Universal Declaration of Human Rights, education is a fundamental tool for the protection of human dignity (United Nations, 1948).

or difficulties in enrolling their children and youth in schools (Fernández et al., 2012).

In the case of migrant children and youth who enter Mexico, the educational system is not prepared to guarantee their integration. Migrant children and youth often face little or no access to documentation that verifies their residency and identity, a lack of awareness about school enrollment processes, and a limited availability of educational opportunities in rural communities. These factors can contribute to higher dropout rates and reduced school attendance among school-age children (United Nations Children's Fund (UNICEF), 2023). This occurs even though Mexican legislation establishes the right to education for everyone, regardless of immigration status.<sup>5</sup>

Regarding this study background, the relationship between education and migration in Mexico has mainly focused on the educational performance of Mexican migrant children and youth in the United States (Jensen et al., 2016; Zúñiga & Carrillo, 2020) and on the educational insertion of Mexican migrant children and youth returning from the United States. Research has emphasized that children and youth with migratory experience show lower school attendance rates compared to those without migratory experiences (Aguilar, 2014, 2021; Aguilar & Jacobo, 2020; Camacho & Vargas-Valle, 2017; Vargas-Valle & Camacho, 2015; Zúñiga & Giorguli, 2019; Vargas-Valle & Aguilar, 2020). Along with school absenteeism, migrant children and youth exhibit higher percentages of educational lag compared to non-migrants (Vargas-Valle, 2023; Aguilar, 2021).

To a lesser extent, the educational outcomes of other migrant population groups in Mexico have been studied. Children and youth from Guatemala, Honduras, and El Salvador in Mexico show higher rates of school absenteeism compared to non-migrants (Aguilar & Giorguli, 2016). Migrants from the United States and children and youth from Central America display differences concerning the time of arrival in Mexico. Children and youth who migrated more than five years before the census survey exhibited higher school attendance percentages and lower rates of educational lag compared to those who had spent less time in the Mexican territory (Vargas-Valle, 2023).

Access to the educational system of migrant children and youth is influenced by family network structures, the student's birth country, school trajectories, the school duration in both countries, the quality of education received in each

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5 In recent years, Mexican legislation has presented adjustments in terms of access to education for migrant children and adolescents, among others. In 2015, the apostille and translation into educational credentials abroad were eliminated (Jacobo-Suárez, 2017). However, the right to education of migrants has been limited by the lack of adaptability to the educational trajectories of children and adolescents with migratory experiences (Zúñiga & Giorguli, 2019).

system, and language use in schools and daily life (Vargas-Valle, 2018). This dynamic potentially interacts with structural barriers in the Mexican educational system (Vargas-Valle, 2018) and the individual characteristics of migrant children and youth and their families. Several adverse factors hinder the adaptation and integration of migrant students into the educational system, limiting the development of targeted actions to ensure their access to education and continued school attendance. Among these factors are the bureaucratization and inflexibility of the educational system and the lack of information and training for teachers in schools who receive migrants from other countries.

Similarly, migration may affect subsequent generations of the migrant's descendants born in countries of destination. One explanation for the academic disadvantages faced by children of migrants compared to their non-migrant peers is the difference in social and cultural capital, stemming from the diverse backgrounds and heterogeneities that migrants bring to their country of destination (Cerrutti & Binstock, 2009). Additionally, factors such as living in a two-parent household (with both biological parents) and the parents' socioeconomic status also play a relevant role (Portes & Zhou, 1993).

In the context of migration, a key area of interest is the integration of migrants in their destination communities, recognizing that this process is not linear and "is influenced by factors such as age at arrival, parents' birth country, and characteristics of the social context of the destination, including migration policies" (Aguilar, 2021, p. 84). Characteristics like age at migration and birthplace of immigrant children and youth and their parents enable the classification of migrants into generational groups (Rumbaut, 2004).

This study analyzes the educational outcomes of migrant children and youth from diverse contexts, such as the United States and other regions. Unlike previous research, this analysis examines migrant generations, recognizing that children and youth may experience migration through their migratory displacement or because of their parents' prior migratory flows (Giorguli, 2022). Similarly, this study explores both school attendance and educational lag, measuring the retention and academic progress of children and youth participating in the Mexican educational system. In this case, both migrant children and youth in Mexico are considered children of international migrants who were born in Mexican territory. This is relevant to understanding the educational integration processes of migrants and their descendants in Mexico.

## Socio-demographic Profile According to Migrant Generation

Children and youth may find themselves in diverse migration contexts, either through their migration to a new country or as members of families with migratory experience. One analytical strategy to reflect on children and youth associated with migration processes is the construction of categories according to their age, birthplace, and their parents' birthplace (Rumbaut, 2004). Thus, building on previous research that empirically defines migrant generations (Rumbaut, 2004) and studies that shed light on specific insights for the Mexican case (Aguilar, 2014; Aguilar & Jacobo, 2020; Zúñiga & Giorguli, 2019), this research classifies migrant generations into the following school-age population groups (from five to 17 years):

- **Non-migrant:** children and youth born in Mexico with both parents being Mexican or with the only parent residing at household being Mexican. In this case, the sample was limited to children and youth who reported residing in Mexican territory five years prior.
- **Born in the United States:** Children born in the United States Territory were excluded from the immigrant group since, in most cases, they are the children of Mexican parents.<sup>6</sup>
- **Generation 1.5:** born in another country – different from the United States.
- **Generation 2.0:** children and youth born in Mexico with both parents being immigrants or the only parent residing in the household being a foreigner.
- **Generation 2.5:** Children and youth born in Mexico to mixed unions, either with a Mexican mother and an immigrant father or an immigrant mother and a Mexican father.

While this classification aims to enhance the diversity of immigration in Mexico, it has limitations, including the sample size, which restricts the possibility of joint disaggregation by age and parents' country of origin, and the lack of information on the birthplace of both parents, regardless of whether they

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<sup>6</sup> Zúñiga and Giorguli (2019) have denoted this generation as 0.5, given that it recovers the sense of migration from north to south, and the arrival of the parents in the country. According to Mexican law, this population is entitled to Mexican citizenship by birth.

reside in the household. The data available in the expanded questionnaire of the 2020 Population and Housing Census provided by the National Institute of Statistics and Geography (INEGI, 2020) is used to reach the objectives. Based on this information, the analysis comprises a sample of 3,727,478 observations, representing a population of 28,158,830 girls, boys, and adolescents. Annex 1 provides detailed information on the methodological considerations, limitations, and sample selection for the analysis.

## **Demographic Characteristics**

Census estimates indicate that 401,592 children and youth were born in the United States, making them the largest group among migrant generations. Immigrant children and youth from other countries (Generation 1.5) total 42,175, representing just over one-tenth of those born in the United States (see Table 2). The second generation consists mainly of children of mixed unions between Mexican and foreign parents.

The total population of Generation 2.5 is three times larger than that of Generation 2.0. This phenomenon may be associated with the migration of individuals who were single or previously in a union and who, upon arriving in Mexico, formed a partnership with a Mexican. For many parents, both their union and the start of motherhood or fatherhood occurred in Mexico. Similarly, these results underscore the importance of disaggregating, to the extent permitted by census data, second-generation migrants into those with foreign parents and those with one Mexican parent.

**Table 1.** *Distribution by Sex and Age of Non-migrant Children and Youth, Immigrants, and Children of Immigrants Residing in Mexico (population aged 5 to 17 years).*

Age Group	Migrant Generation				
	Non-migrant	Born USA	Gen. 1.5	Gen. 2.0	Gen. 2.5
<b>Gender</b>					
Women	49.2	49.4	48.8	50.9	48.9
Men	50.8	50.6	51.2	49.1	51.1
<b>Women</b>					
Age (mean in years)	10.9	11.9	10.8	10.2	10.0
<b>Age Groups</b>					
5-11	53.9	40.7	55.6	61.0	65.7
12-14	23.1	33.7	21.7	20.9	18.1
15-17	22.9	25.7	22.7	18.0	16.1
<b>Men</b>					
Age (mean in years)	10.9	11.8	10.9	10.5	9.9
<b>Age Groups</b>					
5-11	54.1	41.4	55.0	60.5	66.1
12-14	23.1	33.8	22.8	19.9	18.9
15-17	22.8	24.7	22.2	19.6	14.9
<b>Total</b>	<b>27,585,080</b>	<b>401,592</b>	<b>42,175</b>	<b>33,133</b>	<b>96,850</b>

Source: authors' calculations from the *Mexico Population and Housing Census 2020*. Weighted values. The percentages add up to 100% per column for each gender. Note: Gen: Generation.

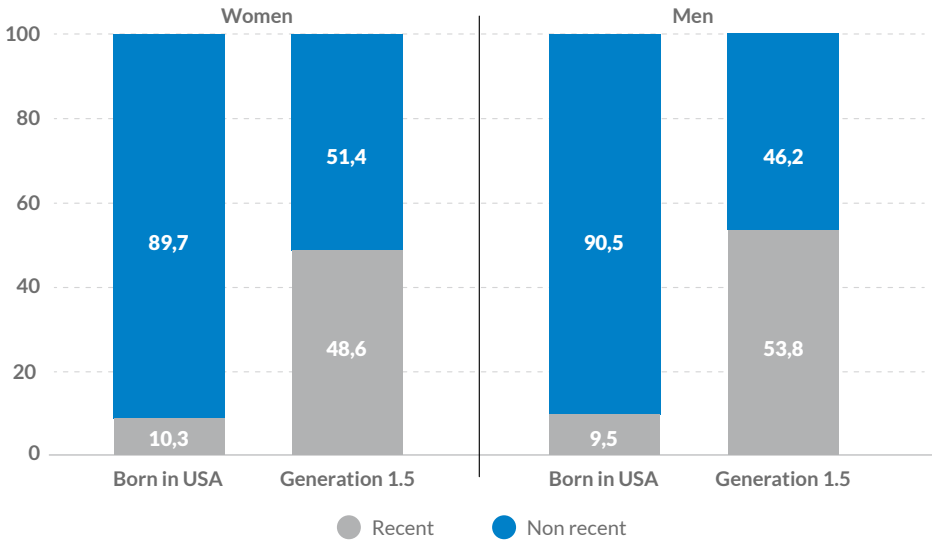
Notable among the characteristics is the equitable gender distribution, which is consistently similar across all the analyzed population groups. On average, both Mexican and immigrant children and young people are between 10 and 11 years old, except children born in the United States who are one year older. Second-generation children and youth (2.0 and 2.5) are primarily concentrated in the 5-11 age range. When they enroll in the educational system, they do so at levels where basic education is nearly universal, with age as an important indicator of both school attendance and retention.

**Table 2.** *Region and Country of Birth of Migrant Children Born in the United States and Generation 1.5 in Mexico, 2020.*

<b>Region/Country</b>	<b>Total</b>
North America	
United States	401,592
Canada	3,097
Central America	
Guatemala	6,914
Honduras	5,075
El Salvador	2,083
Other countries in Central America	1,699
Caribbean	
Cuba	1,433
Other Caribbean countries	181
South America	
Venezuela	7,851
Colombia	2,030
Argentina	1,520
Other South American countries	3,341
Other regions	
Spain	1,971
Other immigrants	4,980
<b>Total</b>	<b>443,767</b>

Source: authors' calculations from the *Mexico Population and Housing Census 2020*.  
 Note: For the disaggregation by country, only samples with more than 30 observations were considered. Information was disaggregated for the countries where this criterion was met; however, when this was not possible, the data was aggregated by region of origin.

Most foreign-born non-US children and youth come from Latin America, primarily from Venezuela (18.6%), Guatemala (16.3%), and Honduras (12.0%). The country of origin of immigrant children and youth in Mexico offers insights into their educational opportunities before migration, as well as the selective migration profiles associated with certain countries. Based on the Intercensal Survey, Pardo and Dávila-Cervantes (2019) demonstrated that Central Americans aged 18 and over exhibit higher percentages at the lowest levels of schooling, meaning they have no formal or only incomplete primary education. South Americans reported the highest levels of schooling, with nearly two-thirds of their population holding a bachelor's degree or higher degrees. Similarly, the distribution of children and youth by country of origin reflects the immigration processes to Mexico.



**Figure 1.** *Recent and Non-recent Migration of Immigrant Children and Youth Residing in Mexico Based on Gender.*

Source: authors' calculations from the Mexico Population and Housing Census 2020.  
Note: for each category, observations that did not report country of residence five years before the census survey were excluded, corresponding to less than 0.05% of the weighted sample. Recent migrants refer to individuals who arrived in Mexico between 2015 and 2020.



By arrival period, nine out of 10 individuals born in the United States arrived in Mexico more than five years ago. As for Generation 1.5, which includes immigrant children and youth from other countries, the majority (53.8%) of males arrived in Mexico after 2015, while a slight majority of females arrived in previous decades. In addition to age, the length of stay in destination societies is a key factor in understanding integration processes. The expectation is that, as individuals remain in Mexico longer, they and their immigrant and native-born children may increasingly participate in various aspects of educational, work, and social life. Escoto and Masferrer (2021), affirm that the educational and labor participation of immigrants born in the United States are associated with the length of time they have spent in Mexican territory. Individuals who have recently arrived would be less likely to be enrolled in school compared to non-recent US migrants.

## **Family Context**

This section analyzes relevant family variables that complement the characteristics of children and youth, which are, in turn, associated with educational outcomes. An advantage of census data is its ability to provide identifiers for the mother, father, or spouse residing within the same household. These variables enable the identification of parent and child relationships beyond the kinship ties to the head of the household, enabling the construction of matched pairs by associating their characteristics. This is relevant to the proposed objectives, as it enables the identification of migrant generations based on the birth of school-age children and youth and the migratory backgrounds of their parents, as well as the analysis of mixed unions between immigrants and foreigners.

A limitation is that the data only allows for linking information of individuals residing within the same household, thus introducing biases when linking the information of parents and partners present at the time of the census survey. As a precaution, for second-generation migrants (2.0 and 2.5), the analysis considers only the current union, specifically among heterosexual couples residing with their children in the same household at the time of the census.

**Table 3.** Family Arrangements of Non-migrant Children and Youth, Immigrants and Children of Immigrants in Mexico, 2020.

Family variables	Migrant Generation				
	Non-migrant	Born USA	Gen. 1.5	Gen. 2.0	Gen 2.5
<b>Household size</b>					
1-4	40.7	44.7	52.6	49.0	43.2
5-7	48.0	48.9	41.0	38.5	49.4
8 and over	11.3	6.4	6.4	12.5	7.4
<b>Relationship to Head of Household</b>					
Daughter/son	77.8	82.1	84.6	85.8	92.5
Granddaughter/ Grandson	18.4	14.8	5.4	10.1	6.7
Other kinship	3.6	2.9	9.3	3.0	0.80
Unrelated	0.1	0.1	0.7	1.0	-
<b>Parental co-residency</b>					
Mother only	23.1	28.3	24.4	49.5	-
Father only	3.6	4.2	4.0	11.0	-
Resides with both parents	66.2	61.0	63.4	39.5	100.0
None	7.0	6.6	8.1	-	-

Source: authors' calculations from the *Mexico Population and Housing Census 2020*.

Note: Co-residency with both parents is 100% for Generation 2.5 due to the criteria established for defining this group; determining the parents' countries of birth was only possible when both parents resided in the same household. Note: Gen: Generation.

The number of household members reflects the developmental stage of the household—whether in the phases of exposure, formation, or dissolution—and provides insight into the presence of other relatives and the competition for resources among children and youth within the same household. The results for immigrants and their children indicate that the majority reside in households with seven or fewer members, a characteristic typical of the household formation stage. Most are daughters or sons of the head of the household, although 14.8% of those born in the United States and 10.1% of Generation 2.0 are grandchildren. For individuals born in the United States, a small rate does not live with either parent and are more likely to reside with their grandparents (Masferrer et al., 2019). Generation 2.0 has the lowest rate of all groups of interest residing with both parents (39.5%), with nearly half living exclusively with an immigrant mother.

## Geographical Context

Migrant children and youth and children of immigrants are unevenly distributed across the Mexican territory. Most children and youth live in urban areas, with higher rates among Generations 1.5 and 2.5. Nearly 85.0% reside in localities with more than 2,500 inhabitants. Regarding regional distribution, a remarkable rate of migrant children and youth born in the United States reside in the Northern Border region, which reflects a return pattern of Mexicans and their presence in the border states. Meanwhile, a significant rate (34.2%) of children and youth from Generation 1.5 live in the central zone, including Mexico City. For Generation 2.0 children and youth, nearly half (49.6%) reside in the South-Southeastern states, including those along the Mexico-Guatemala border, a traditional destination for Guatemalan populations and, more recently, for other Central American groups. Finally, Generation 2.5 is evenly distributed across the four regions.

**Table 4.** *Geographic Location of Immigrant Children and Daughters/Sons of Immigrants in Mexico, 2020.*

Geographical Location	Migrant Generation				
	Non-migrant	Born USA	Gen. 1.5	Gen. 2.0	Gen. 2.5
<b>Place of residence</b>					
Rural	23.8	23.1	15.0	26.3	15.6
Urban	76.2	76.9	85.0	73.7	84.4
<b>Region of Residence</b>					
Northern Border	17.9	41.5	22.0	16.0	26.4
North	26.1	31.2	14.4	11.5	21.2
Central	38.0	18.9	34.2	22.9	27.3
South-southeast	18.1	8.4	29.3	49.6	25.1

Source: authors' calculations from the *Population and Housing Census of Mexico, 2020*.  
Note: "Rural" refers to towns with fewer than 2,500 inhabitants. In the Northern Border region of residence, the states of Baja California, Baja California Sur, Coahuila de Zaragoza, Chihuahua Nuevo León, Sonora, and Tamaulipas were grouped. In the North: Aguascalientes, Colima, Durango, Guanajuato, Jalisco, Michoacán de Ocampo, Nayarit, San Luis Potosí, Sinaloa, Zacatecas. In *Central*: State of Mexico, Mexico City, Hidalgo, Morelos, Puebla, Querétaro, Tlaxcala, Veracruz de Ignacio de la Llave. In *the south-southeast*: Campeche, Chiapas, Guerrero, Oaxaca, Quintana Roo, Tabasco, and Yucatan.

Residence, whether in rural or urban areas and across different regions of Mexican territory, is a critical factor in understanding the educational inclusion opportunities for the migrant population and children of immigrants. This denotes the presence of immigrant populations and second generations across the Mexican territory, although with higher percentages in the border areas. The distribution of the immigrant population and children and youth within migration contexts, including immigrants and children of foreigners, indicates that their educational opportunities will largely depend on their place of residence, reflecting existing educational inequalities in Mexico. With marked differences between regions (Giorguli et al., 2010; Mier, Terán & Rabell, 2002). These are associated with the educational offer available and the quality of education.

### **School Attendance and Educational Lag Based on Generations of Migrants**

School attendance is an indicator of the (re)entry into the educational system of immigrant children and youth, thus being one of the first indicators of educational integration. One advantage of the census is the data on school attendance and the highest level of education completed (INEGI, 2021). The combination of school attendance and the last grade completed enables the identification of whether enrolled children and youth attend the appropriate level for their age, based on the normative age ranges for primary, secondary, and upper secondary education. Based on these educational levels, age groups are formed: five to 11 years for primary school, 12 to 14 years for secondary school, and 15 to 17 years for upper secondary school.

In Mexico, a large proportion of non-migrant children and youth, immigrants, and children of migrants participate significantly in the educational system, although there are noteworthy contrasts between these groups. Among children aged five to 11, non-migrants, those born in the United States, and children of migrants with a Mexican parent (Generation 2.5) exhibit near-universal school participation, with rates close to or exceeding 90%. In contrast, foreign-born children and youth (Generation 1.5) have a non-attendance rate of 20.9%. Individuals born in Mexico to two foreign parents (Generation 2.0) display lower school attendance rates than their non-migrant peers and those from Generation 2.5. However, their attendance is not as low as that of foreign-born individuals.

A similar pattern of differences is observed among children and youth aged 12 to 14. The advantage of school participation among those born in the United States persists, while, at the other end of the spectrum, migrant children and youth (Generation 1.5) continue to exhibit notably lower school attendance. In the older age group (15 to 17), school attendance rates decrease considerably across

all population categories. This trend is a distinct characteristic influenced by the transition to upper secondary education, temporary interruptions in studies, the combination of education with paid work, or school dropout. In this case, children of mixed unions display the highest levels of school attendance, with rates that are even ten percentage points higher than those of non-migrants between 15 and 17 years. Meanwhile, approximately four out of 10 children and youth from Generation 1.5 are no longer attending school in Mexico.

These findings indicate that both undertaking a personal migration process and experiencing parental migration may be associated with lower school attendance among children and youth in Mexico, with remarkable differences observed between migrant generation groups. For example, individuals born in the United States appear to be in the opposite situation. This aligns with the proposals of Aguilar and Giorguli (2016) and Vargas-Valle (2023), which enhance lower school attendance rates among migrant children and youth in contrast to non-migrants and smaller gaps among migrants from the United States. However, this measure provides scarce insights into the retention processes and academic progress within the educational system.

Using data on school attendance and the last grade completed, an "educational outcome" indicator is built to measure both the retention and the academic progress of the children and youth participating in the Mexican educational system.<sup>7</sup> The variable comprises four scenarios: attendance without educational lag, attendance with educational lag, non-attendance without educational lag, and non-attendance with educational lag. Overall, differences between groups persist, with immigrant children and adolescents (Generation 1.5) exhibiting the lowest participation rates in the educational system at the normative age (without educational lag). Remarkably, children and youth born in Mexico to two foreign parents (Generation 2.0) exhibit a high percentage of school attendance with educational lag starting at age 12.

This suggests that while second-generation children and youth exhibit higher rates of school attendance, their academic progress is hindered by grade repetition, delayed school entry, or academic failure. For migrant parents, delayed school entry may be associated with their parents' integration into the workforce or the family's adaptation to new environments. However, this analysis does not include controls for parents' educational achievements. Another possible hypothesis is that the outcome for Generation 2.0 may reflect the lower educational attainment of a significant segment of low-skilled immigrants in Mexico. In any

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<sup>7</sup> The classification of educational results based on the combination of attendance and school lag indicators is based on the proposal made by Aguilar (2014).

case, this finding underscores the need to develop support strategies for children and youth of migrants in Mexico, starting from secondary education.

Migration may influence educational trajectories. On the one hand, for individuals born abroad who now reside in Mexico, migration has involved a change in schooling or daily life and possibly an adjustment process to the new environment, which may create disadvantages in their school participation from an early age. On the other hand, for children and youth, both their own migratory experiences and those of their parents may be associated with lower levels of school attendance. Moreover, for those born abroad, the (re)integration process may present additional barriers. This may be related to requirements such as providing documentation or academic records for those who previously attended school outside of Mexico, as well as parents' lack of awareness of children's and youth's rights to access the educational system regardless of their immigration status.

**Table 5.** *Educational Results of Immigrant Children and Children of Immigrants in Mexico, 2020.*

Age group	School attendance	Non-migrant	Born USA	Gen. 1.5	Gen. 2.0	Gen. 2.5
<b>8-11 years</b>	Attend without educational lag	91.4	92.6	64.5	82.6	88.3
	Attend with educational lag	2.5	2.6	6.8	4.0	3.2
	Does not attend without educational lag	5.1	4.2	19.3	9.7	7.4
	Does not attend with educational lag	0.9	0.5	9.3	3.6	1.1
	Total	100.0	100.0	100.0	100.0	100.0
<b>12-14 years</b>	Attend without educational lag	81.2	88.2	53.1	67.7	80.7
	Attend with educational lag	5.4	4.7	13.5	12.0	7.1
	Does not attend without educational lag	8.0	5.2	9.6	9.9	6.9
	Does not attend with educational lag	5.4	1.8	23.8	10.3	5.2
	Total	100.0	100.0	100.0	100.0	100.0
<b>15-17 years</b>	Attend without educational lag	58.4	68.4	37.7	48.1	67.8
	Attend with educational lag	6.3	6.4	10.6	12.2	7.3
	Does not attend without educational lag	13.6	14.0	10.0	10.9	9.7
	Does not attend with educational lag	21.7	11.1	41.6	28.7	15.2
	Total	100.0	100.0	100.0	100.0	100.0

Source: authors' calculations from the Population and Housing Census of Mexico, 2020.

Children of mixed unions tend to remain in the educational system at higher rates compared to the other three migrant generation groups and those born in the United States. From the youngest ages, there appears to be a certain preference for entering and remaining in the educational system. However, for non-migrant children and youth over 15 years, continuing in upper secondary education is less common, which may be associated with engagement in paid work. As shown in the descriptive statistics, this group also has the highest urban presence. Further research could explore the role of parental educational attainment among Generation 2.5 children as a potential explanatory factor for their better educational outcomes.

## Concluding Remarks

In Mexico, although education is compulsory up to the upper secondary level (INEE, 2019), differences in both school attendance and academic performance have been identified among different migrant generation groups. For children and youth born abroad (Generation 1.5), school attendance and no educational lag show lower rates compared to those born in Mexico to migrant parents (Generations 2.0 and 2.5) and to those of the same generation born in the United States.

For Generation 1.5 children and youth, opportunities to participate in the educational system appear to be limited from primary school onwards, with this unfavorable situation becoming more pronounced among older adolescents (15 to 17 years old). Even when regularly enrolled in school, their academic progress is more likely to be characterized by educational lag, possibly due to changing schools from one country to another or being unable to enroll in the appropriate grade level. These findings align with those of Aguilar and Giorguli (2016) concerning Generations 1.0 and 1.5 of Central American migrant children and youth in Mexico. This study includes a broader range of countries, highlighting that migration has a disruptive effect on education for those who move from one country to another, compared to children and youth with migrant ancestry (second generations).

For older children and youth, non-school attendance may be associated with engagement in paid work (Escoto & Masferrer, 2021). Similarly, being a student as an exclusive activity is a condition of *privilege*; those who manage to stay in school have sufficient opportunities and economic resources (Mata, 2020).

The educational outcomes of migrant children and youth, as well as those in migratory contexts, reflect the influence of the migration process on both their

own lives and their parents' experiences. It appears that parents may experience varying degrees of integration, which, in turn, influence the educational performance of migrant children and youth and Mexican-born generations. Based on the analysis of census data, these differences in school experiences draw attention to a population of school-age children who are not fully exercising their right to education, either due to lack of access or challenges in remaining and progressing within the educational system. This initial analysis raises new questions about the potential future of schools and other work or social spaces in Mexico for populations connected to immigration. Similarly, inequalities may be associated with educational gaps between immigrants and children of immigrants, compared to non-migrants, thus widening at older ages or in other aspects of life, such as employment.

This article has provided insights into the relationship between education, migration, and migrant ancestry in Mexico as a country of destination. However, these findings from this exploratory study should be interpreted with caution, given the cross-sectional nature of the data, which offers limited insight into the educational trajectories of both immigrant children and youth and those born in Mexico with migratory descent. For instance, whether the educational lag among those born outside Mexico occurred before or as a result of the migratory movement is unclear. Similarly, while it has been estimated that children of mixed unions exhibit smaller school performance gaps, further research is needed to explore the underlying mechanisms at play—first, in the initial formation of unions between Mexicans and immigrants, and later, in how these unions may produce differentiated effects on the educational experiences of their children. In the Mexican context, there remain aspects to explore through future research using more detailed data or qualitative approaches, which could provide a deeper insight into the differences between first-generation (1.5) and second-generation (2.0 and 2.5) children and youth.

This analysis does not control parents' educational attainment. That the observed results reflect differences in parents' educational profiles or are associated with varying educational opportunities across the country is highly likely. Similarly, there may be differences based on the country and place of origin of children (Generation 1.5) or their parents (for Generations 2.0 and 2.5). The differing patterns observed between children and youth born in the United States and those born in other countries provide an evident clue of how these results are influenced by the country of origin.

This study is an opportunity for a more in-depth exploration of the educational situation of immigrant children and youth and children of immigrants, incorporating additional dimensions of analysis. In this regard, future research agendas should focus on expanding the analysis by gender, examining differences



based on place or country of origin, and considering the influence of urban and rural settings and place of residence in Mexico.

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Annex 1

The selected sample corresponds to school-age children between the ages of five and 17, consisting of 3,727,478 observations. Due to the low coverage and maintaining homogeneity with international educational research, the population of preschool age (before the age of five) was excluded. Similarly, the sample excluded the cases with no information on the variables of interest. Specifically, in sample values, 2,363 were not included in the analyses that did not specify the condition of school attendance; 8,346 that did not report information in the number of years studied; 820 observations that did not report information on the country of birth; and, finally, 949 cases whose family position was domestic worker, relatives of the domestic worker or guests. In total, these cases represent less than 0.5% of the total sample.

According to the migrant generation and age, the sample is distributed as follows:

**Table A1.** *Sample and Population Value of Census Information According to Migrant Generations.*

Sample						
Age Group	Migrant Generation					Total
	Non-migrant	Born US. A	Jan 1.5	Jan 2.0	Jan 2.5	
5-11	2,004,842	20,591	1,463	1,544	4,948	2,033,388
12-14	841,140	18,796	571	524	1,371	862,402
15-17	816,408	13,167	629	457	1,027	831,688
Total	3,662,390	52,554	2,663	2,525	7,346	3,727,478

Weighted Values						
5-11	14,896,778	164,961	23,323	20,141	63,870	15,169,073
12-14	6,373,155	135,470	9,403	6,767	17,920	6,542,715

Sample						
Age Group	Migrant Generation					Total
	Non-migrant	Born US. A	Jan 1.5	Jan 2.0	Jan 2.5	
15-17	6,315,147	101,161	9,449	6,225	15,060	6,447,042
<b>Total</b>	<b>27,585,080</b>	<b>401,592</b>	<b>42,175</b>	<b>33,133</b>	<b>96,850</b>	<b>28,158,830</b>

Source: Authors' calculations from the Population and Housing Census of Mexico, 2020.

Note: returned Mexican migrant minors (8,156 cases) were excluded from the analysis.

The expanded census questionnaire is based on single-stage, stratified, and cluster sampling (INEGI, 2020). In each variable, having a minimum of 30 observations, with confidence coefficients below 30.0% to determine the accuracy of the estimators, in order for the populations of interest to be statistically representative was ensured.

Regarding work limitations, due to the data source used and the sample sizes, disaggregating immigrant children born in countries other than the United States was not possible. Likewise, given the characteristics of the census, the information is based on people who share the same home, which means that the classification of the generations is based on the place of origin of the father/mother present in the household. This can be problematic due to a possible underestimation in the classification of second generations, especially 2.5, where the absent parent may be Mexican and, given the context of emigration in Mexico, their absence at home is related to mobility to another country. A similar situation occurs with Generation 1.5, when they reside only with the mother or father, since it is unknown whether the parent who does not reside in the home is a foreigner or a Mexican.

In the family context section, the percentage of children living alone with their mother, only with their father, with both or neither was estimated. About six out of ten of the non-migrant children born in the United States and Generation 1.5 live with both parents, while only 39.5% of Mexican-born children with migratory ancestry live with both parents. Despite these limitations, the proposal is considered broad enough to understand the migratory processes (own and family) of children and adolescents and make comparisons of educational outcomes between different generations of migrants, to detail their needs and articulate some proposals of the relationship between international migration, education and mixed unions.

# Venezuelan Migrant Children: An Assemblage Experience in Soacha, Colombia\*

[English version]

Niños y niñas migrantes venezolanos: una experiencia de agenciamiento en Soacha, Colombia

Crianças migrantes venezuelanas: uma experiência de agenciamento em Soacha, Colômbia

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## Abstract

**Objective:** To analyze the agency of a Venezuelan migrant girl and boy residing in the municipality of Soacha, Colombia, recognizing them as meaning-makers based on

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their own experiences and lived practices during the migration process. **Methodology:** Grounded in the historical-hermeneutic paradigm, employing a qualitative approach in dialogue with narratives, various artistic languages, and artistic expressions. **Results:** Some of the findings unveil reflections on the vulnerability of children in migration processes, as well as the visibility of their capacities, such as affiliation, adaptation, sense of belonging, autonomy, and identity. **Conclusions:** The study highlights the need to move beyond an assistance-based perspective on children, shifting away from deficit- and scarcity-focused approaches to recognize them as political agents with the capacity and potential to transform their socialization environments through reflection and action.

**Keywords:** migration; childhood; artistic expressions; agency; Colombia (obtained from the UNESCO thesaurus).

## Resumen

**Objetivo:** analizar el agenciamiento de una niña y un niño migrantes venezolanos ubicados en el municipio de Soacha, Colombia, reconocidos como hacedores de significados a partir de sus propias experiencias y prácticas vividas en el proceso migratorio. **Metodología:** se fundamentó en el paradigma histórico hermenéutico, empleando un enfoque cualitativo en diálogo con las narrativas, los distintos lenguajes del arte y las expresiones artísticas. **Resultados:** algunos de los resultados desentrañan las reflexiones sobre la vulnerabilidad de los niños y niñas en los procesos de migración, así como la visibilización de capacidades como la afiliación, adaptación, sentido de pertenencia, autonomía e identidad que poseen. **Conclusiones:** se evidencia la necesidad de trascender la mirada asistencialista de los niños y niñas, alejándose de enfoques centrados en el déficit y la carencia para reconocerlos como agentes de cambio político con capacidades y posibilidades de transformación de sus entornos de socialización mediante la reflexión y la acción.

**Palabras clave:** migración; infancias; expresiones artísticas; agenciamiento; Colombia (obtenidos del tesoro Unesco).

## Resumo

**Objetivo:** Analisar o agenciamento de uma menina e um menino migrantes venezolanos localizados no município de Soacha, Colômbia, reconhecidos como criadores de significados a partir de suas próprias experiências e práticas vividas

no processo migratório. **Metodologia:** O estudo fundamentou-se no paradigma histórico-hermenêutico, empregando uma abordagem qualitativa em diálogo com narrativas, diferentes linguagens da arte e expressões artísticas. **Resultados:** Alguns dos achados revelam reflexões sobre a vulnerabilidade das crianças nos processos migratórios, bem como a visibilização de capacidades como afiliação, adaptação, sentido de pertencimento, autonomia e identidade. **Conclusões:** Evidencia-se a necessidade de transcender a perspectiva assistencialista em relação às crianças, afastando-se de enfoques centrados no déficit e na carência, para reconhecê-las como agentes de mudança política, com capacidades e possibilidades de transformação de seus ambientes de socialização por meio da reflexão e da ação.

**Palavras-chave:** migração; infâncias; expressões artísticas; agenciamento; Colômbia (extraído do tesouro da UNESCO).

## Introduction

To leave home, move individually or in groups, cross borders and settle in other lands responds to a social term called 'migration'. A category necessary to address one of the recent problems in Latin America that has affected the lives of countless people who face political, economic and social issues, and start new lives in foreign and unknown places. This paper arises from postgraduate research focused on the migratory phenomenon of Venezuelan population towards Colombian territory. It makes visible the voices of people who most of the time are not asked, explained or inquired about their participation in this process: Venezuelan children. In this case, the participation of a girl and a boy about their experiences is taken into consideration. It is not intended to show what happens to all the children of Soacha, Cundinamarca, within the framework of their migratory processes.

Castillo et al. (2020) identify this event around 2005 when the political and socio-economic situation of Venezuela generated a massive migratory process to Colombia. The figures at that time showed the largest migratory phenomenon of the Venezuelan population in Latin America, and the second in the world. These same figures show a high increase in displacement of children and exposed to different types of situations that violate their rights and put their physical, mental and emotional integrity at risk. The mobilization of these children also leads to less encouraging situations, they often do not have social protection, food, housing, health and education. They also suffer from discrimination in their socialization environments that limits their human development. And, in legal terms, their undocumented status spoils the guarantee of their rights to health, education, food and, mainly, allows impunity for crimes against them.

The recognition of these children as active subjects within collective actions of their population is increasing. The concept of "assemblage" allows to define, express, study and propose the child's participation in society. Contrary to the perception of children as passive or simple spectators, assemblage involves the recognition of children as subjects capable to understand, dialogue and propose solutions from reflective attitudes in their closest socialization environments.

According to Deleuze and Guattari (2004) "Assemblage" is understood as a concept in form of a rhizome that "[...] must be produced, built, always removable, connectable, alterable, modifiable, with multiple inlets and outlets, with their lines of flight" (p. 25). In this case, it includes children as subjects in a territory, historical and social that have built and build specific ways of understanding the world and act in it. This possibility of understanding their reality leads them to

think and reflect on possible and diverse ways of inhabiting their spaces, trying to unsettle the order given and imposed.

For Deleuze and Guattari (2004),

Every assemblage is foremost territorial. The first concrete rule of assemblage is to discover the territoriality as there is always one. The territory creates the assemblage. The territory exceeds both the organism and the environment, and the relationship between them, the assemblage goes beyond simple behavior. (p. 513).

Children's assemblages allow them to see migration from the power they have to transform their territory. Their affiliation capacity means the presence of others, generates emotional and cognitive connections. According to Deleuze and Guattari (2004) it allows them to think from the collective and change situations from the lines of flight to transform given or imposed the structures.

To better understand the relationship between assemblage and territory, Guattari and Rolnik (2006) state that:

Territory is appropriation, with self-enclosed subjectivation. The territory can be deterritorialized, that is, open and undertake lines of flight and even altered and be destroyed. Deterritorialization will consist of an attempt to recompose a territory engaged in a process of reterritorialization. (p. 372).

In this way, authors present "reterritorialization" as new ways of thinking and building the territory that is inhabited. It goes from desire to transformative action, and subjects are always understood in motion. Thus, protected by the right to expression, the voices of children are stronger in this research. This usually focuses on adult-centric gazes and evidences the stated concept by Deleuze and Guattari (1980): "The assemblages are always in motion, even if what moves is immobility" (p. 10).

However, compared to records review, there are some researches that show the migratory experiences of children. These should be an important input in the proposals and execution of public policies or social projects that benefit and accompany them from welfare services.

Pavez-Soto (2016) criticizes Portes and Rumbaut (2001), authors who develop a theory on how adults in migrant families should act to achieve the incorporation and assimilation of children to their new contexts. It highlights severe authority and physical punishment, which

[...] not only denies the assemblage of migrant children (from an adult-centric axis) but the assemblage of adults is also analyzed of their greater or lesser integration into the system and market. (Pavez-Soto & Sepúlveda, 2019, p. 107).

In this way, a mutism of children's expressions, silence and even concealment of their experiences, feelings and bullying is identified. Vulnerabilities that lead to a social challenge to understand its subjectivity in its several manifestations and languages, and the interpretation of migration.

In the development of this research, governmental and non-governmental studies and reports were found, grouped in an interpretative way into three large emerging categories. The first category was "determining causes of migration" UNHCR and Legal Option (2017), Fernández and Arcken (2020), Migration Ministry of Foreign Affairs Colombia (2021), Ordoñez and Ramírez (2019), Linares (2019), and Lotero et al. (2020). The second category was "structural migration from an adult-centric view", Álvarez (2009), Koechlin and Eguren (2019), Freitez (2011). Finally, in the third category was "transnational families", Bedoya (2020), Ramírez-Martínez et al. (2021) and Posada (2017).

The review shows that there is a wide production of knowledge on migration. From one perspective, a quantitative approach reflects objectivity and rationality exposed in figures, percentages and statistics. And from qualitative approaches by stories, life stories and systematization of experiences. However, they mostly focus on adult-centric visions of migration, it reveals an insufficient approach to children, invalidation of their voices, impossibility of positioning them as participatory subjects, no recognition of their rights and annulment of their experiences.

Thus, there is a need to know, recognize and make visible the voices of Venezuelan migrant children, in the municipality of Soacha, Colombia. A place where the largest migrant population in the Republic of Venezuela is concentrated as it is to the Colombian capital. According to figures from *Migración Colombia*, by March 2022, the entry of Venezuelan foreigners to Soacha was around 26,922. Although residence and establishment in the area proved to be a great social impact, several government and private programs were developed to mitigate lack of housing, health, food, protection, safety and care.

The most vulnerable are children in conditions of overcrowding, malnutrition and without education. There is low municipal budget for supporting migrant residents since, according to the Colombian Red Cross (2020), Soacha borders Bogotá city, it is a recipient of many internal and Venezuelan migrants. These people face many social, economic and political challenges, as they are in situations of high social vulnerability.

However, as it has been stated, the research seeks to understand the experiences of Venezuelan migrant children in Soacha, Colombia, use their capacity and right to expression as a vehicle. In this case, artistic expression was chosen, so children are co-creators within the research process. It facilitates to face ethical and political challenges to recognize them as analytical, participatory and agent subjects of change. This allowed them to be recognized as research peers, it meant respecting their decision-making process in the research exercise, accept and recognize the expression of their ideas, thoughts, feelings, and emotions of the way they wanted to do it. This included different languages of art, so it was key to understand Saracostti et al. (2015), who referred Graham and Fitzgerald:

As for the research process, it implies an ethical effort since it involves a carefully designed methodology, and to engage in a dialogue with children and adolescents that makes it possible to co-construct their visions and experiences while they make sense of the world (Graham & Fitzgerald, 2010). The idea of co-constructed knowledge implies that adult researchers open themselves to the possibility of change in response to what children and adolescents express. (p. 224).

The challenges that demand children to be co-constructors in the research process promoted in the researchers the capacity for wonder, which is often lost as adults, to listen, so as not to interpret their voices, stories and scribbles from the adult perspective, take care of their times, rhythms and spaces, and respect their decision-making of what they wanted to do or the people they wanted to invite. All this is a personal, academic and research deconstruction which is expected to be showed in these findings.

Finally, this paper goes through two main sections of results called: "The migratory process of children" and "An assemblage experience". These highlight the feelings and meanings that a six-year-old girl and a ten-year-old boy gave to their migratory experience, and the capacities they have to face the journey and the new environments and socialization relationships in Colombia. This accounts for their assemblages as subjects capable of doing, feeling and expressing.

## Methodology

This research is qualitative with a hermeneutical approach. Venezuelan children were studied from their different ways of expression and languages of art. Those are called “scribbles” in this paper, the first drawing made by children, according to Lowenfeld (1961).

The research was interested in the narratives of children. López (2020) refers to Benjamin who mentions that

[...] the narrative consists of sharing experiences to the construction of communities of meaning, it exposes the plurality of subjects and several points of view that can be found from the places of enunciation. (p. 158).

When children narrate their experiences about migration, these expressions allow them to understand their memory processes to see themselves from what they have lived, and also to dialogue with their cultural and social environments. It leads to the recognition of their social life, Ángel (2011): states "Understood in this way, narratives are not a methodology or an object of study in isolation from social life. They are part of culture, and part of a cultural life" (p. 32). When working with children who are co-constructors of their visions and experiences, narratives are not enough since they have multiple art languages to express and communicate. Malaguzzi (2001) states that children have a hundred of languages. Thus, their expressions from art are considered a constitutive part of assemblage of subjectivity and identity of children.

The fieldwork that was carried out from four artistic workshops, two hours each. The workshop was based on the ideas of Malaguzzi, who mentions that this technique generates new interpretations and dialogues in the world of children, and in adults. For Vecchi (cited by Hoyuelos, 2006) the workshop is a creative strategy that allows “[...] greater freedom of thought and variety of styles of approach, according to the reasons why Loris Malaguzzi has chosen to introduce the workshop in the schools of young children” (p. 3). From this approach, it is possible to return two aspects that have been made invisible in traditional education: the importance of expression (Hoyuelos, 2006) and the education of perceptual vision (culturally and transdisciplinarily interconnected with other fields).

Workshops:

- Workshop 1: “100 kilometers of history”
- Workshop 2: “One Voice and One Hundred Steps”

- Workshop 3: "What if you ask me?"
- Workshop 4: "Author theory"

The narratives were systematized from the following documentation instruments: elicitation interview, observation, field diary and empathy map.

The empathy map version was the one proposed by Gray et al. (2012). *Game Storming*, a part of a catalogue of visual tools and creative exercises to solve problems at different stages of *Design Thinking* process was used. This tool was adapted and implemented to record voices and stories of children of migratory experiences.

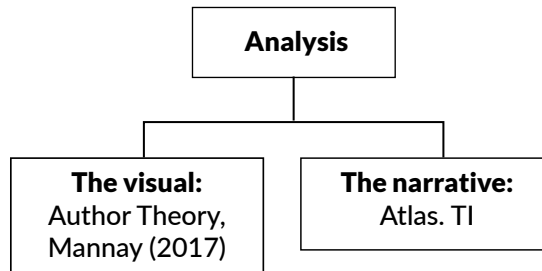
The empathy map was used as an input for organizing the information. During the workshops with printed material, the stories were placed in front of:

- Who were the children who participated in the workshops: a description of the person you want to understand.
- What was the specific objective of the workshop: the specific goal to be achieved.
- What they say: their voices and stories of guiding questions regarding the migration process.
- What they do: their actions and interactions in front of peers and elements of the environment.
- What they think and feel: what motivates their behavior.

The elicitation interview was taken up again from Mannay (2017), who tells us that the image that the same child creates is returned to him or her to interpret it from their own experiences. Artistic productions were interpreted from the Theory of Mannay (2017):

[...] the use of interviews around the images created in the visual data production phase to centralize the meaning-making and interpretations of the participants, i.e. the image makers. In this way, images and narratives are seen as part of a conversation in which interpretation must be incorporated into the contextualized process of the interview, rather than as an analysis of decontextualized and silenced images and stories. (p. 16).





Prism	How to interpret
Context	Elements surrounding the construction of the image such as: Who was involved? Historical-social context Geographical Context
Form	Constituent elements of the image such as: Way of drawing, colors, composition Objects, artifacts, materials Location of subjects and objects
Primary content	What the work wants to say or communicate what the author wants to express
Secondary content	Symbolism, metaphor, duality of senses and the relationships that are generated.

**Figure 1.** *Author theory.*

Among co-constructors children of the research there is a six years old girl called Joseanny. She lives with her grandmother, aunts and cousins, and she has been in Colombia for three years, she represents the early childhood population. Adriel is ten years old, he lives with his father, mother and sister, and he has been in Colombia for four years, he represents the childhood population. These children were chosen for the research, firstly because they wanted to be part of it when children were invited, she and he were interested in and motivated: they were available and had their family consent to participate in the activities.

Regarding the ethical considerations in this project, respect and recognition for multiple expressions of language of children were taken into account according to the proposal and their capacity of assemblage. These were created from their freedom, interest and motivation. Researchers tried not to influence,

modify or transform their creations. Decisions they made in the process, times, spaces, use of materials, guests they wanted to attend workshops, among others, were respected and valued.

## Results

### The Migration Process of Children

“Teacher, it is nice to talk to you, I had a great time, no one had asked me that, and I remembered when I arrived in Colombia, I really liked drawing” (Joseanny, personal communication, April 4, 2022). When the fieldwork was being carried out, this was one of Joseanny's expressions, it shows how invisible children may be to the experience they had in their migration process. They rarely felt the interest of any person to know what they have experienced in migration and how they have felt. It marks the existence and transforms their socialization processes, and the construction of identities and subjectivities.

The methodology in the fieldwork with the children in relation to different expressions of art led Adriel and Joseanny to narrate not only with words, but also with drawings, colors, strokes and games to referred to their trip, to the way they did it, to the things that seemed most significant to them, the motivations, and what they should have left in Venezuela. One of the reasons for their migration was to reunite with their loved relatives, those who have had to travel before them getting better opportunities.

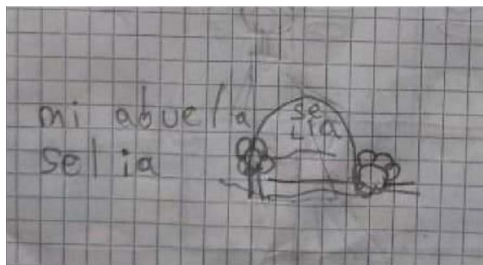
This family reunion is then seen as a gift, they can see their loved ones again, bonds are strengthened and different life opportunities are built. This process made both Joseanny and Adriel happy: “[...] I dreamed of seeing my dad again” (personal communication, April 4, 2022). The fulfilled dream for Adriel since the migration means the reunion with happiness and joy, somehow it is a positive experience for him. For Joseanny, migration represented “[...] a birthday gift” (personal communication, April 4, 2022), since when she came to Colombia, she would meet her aunts and cousins, whom she considers as brothers and with whom she shares daily life in Soacha.

The literature review showed that transnational families have a lot of weight in the production of knowledge that has originated in the field of migration, since, although their members live most of the time apart, they have affective and collective ties that make them stay together (González, 2016). Joseanny

and Adriel's families are not far from experiencing this reality, and the multiple dynamics and transformation processes they have to go through, Joseanny says: "[...] my mother is in Chile but we do not know where my father is, we see each other by video call" (personal communication, April 4, 2022). For Adriel, the experience of having a transnational family is expressed in the following way:

First my aunts and my dad came to Colombia and we made video calls [...] We lived in Venezuela, but my dad came to Colombia and we stayed with my mom and my sister, but my mom was sad, so we traveled to Colombia to be with my dad again (personal communication, April 4, 2022).

For Adriel and Joseanny, the emotion of joy and feeling migration as a gift goes beyond affectations. The reunion with their families may be more important than the things they leave in Venezuela, their friends, school and home; however, it is possible to perceive that the loss of a loved family in their country of origin causes sadness:



**Figure 2.** Drawing made by Adriel during the artistic workshop *One voice and one hundred steps*.

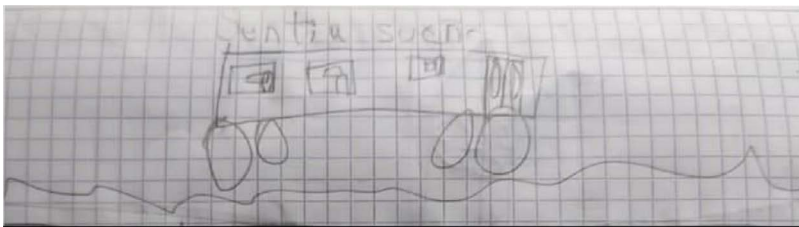
I miss my grandmother Selia and her cat [what happened to your grandmother?]. Teacher, she died [lowers the tone and gets sad to talk about her], but when I go to Venezuela, I will visit her and bring her flowers, my mother says [grandmother dies of Covid]. (Adriel, personal communication, April 8, 2022).

In this way, family ties, practices and the meanings they give to relationships are those things that keep Adriel and Joseanny's families together, helped by Information and Communication Technologies (ICTs) (González, 2016). They also represent safe places for them, support, care and the possibility of being better together. For Joseanny:

[...] my aunts told my grandmother to go to Colombia, why to be alone in Venezuela. They would help her and be aware of her. My mom left me with my grandmother because she went to Chile to work, so I went with her. My mom gave me for my birthday plane ticket (personal communication, April 8, 2022).

Jung's (1991) proposal about the need to listen to children was a big challenge. This made possible the re-construction of migratory experience, and their construction of senses and meanings. Adriel and Joseanny allows them to recognize the feelings and emotions they had on their journey.

Thus, feelings can be mental sensors inside the body, testimonies of life on the move. They can also be our sentinels. They let our conscious, quick, narrow, know about the current state of life and organism for a short time. Feelings are mental manifestations of balance and harmony, dissonance and discordance. (Damasio, 2009, p. 135).



**Figure 3.** Drawing of Adriel in the artistic workshop: 100 kilometers of history.



**Figure 4.** Drawing of Adriel in the artistic workshop: 100 kilometers of history.

When the children were asked how they felt during the trip, Adriel said, “I dreamt” (personal communication, April 8, 2022). He added based on two drawings of a car:

Teacher, I was very happy, my aunts had told me that in Colombia I could study and have many friends and it made me happy, I dreamed of seeing my father again, and I was going to have two houses; one in Venezuela and another in Colombia (personal communication, April 8, 2022).

The migration experience for the children of this research also meant leaving in Venezuela things, places, environments that they will not see or experience again, and it generates some feelings of nostalgia. Some of those things they expressed leaving in Venezuela and missing are the sounds of nature, the wide green spaces and the animals they had.



**Figure 5.** Drawing of Joseanny in the artistic workshop *One voice and one hundred steps*.

[...] I miss the sounds of birds, rivers and beach, my little house that was large, in the yard of the house we had chickens and ducks... and oh, they are colorful... we went to the beach and to the river. I liked to go with my cousins, we played ball. (Joseanny, personal communication, April 15, 2022).



**Figure 6.** Drawing of Adriel in the artistic workshop: *One voice and one hundred steps.*

This is like an...aloe vera. Aloe vera, this is a small square that is in front and here is a grid, the grid looks a little black because the light comes from here...and this is closer, so cover the grid...and I miss the sound of birds, it sounded like birds there. (Adriel, personal communication, April 15, 2022).

To conclude with this section of the migratory process of Joseanny and Adriel, it should be noted that, in one of the workshops, both took a sheet of paper. There, they drew on one side the flag of Colombia and on the other the flag of Venezuela, they draw several lines between the two flags, and narrate the following:

When I was younger, when I was a baby, we used to be here in Venezuela, but now we are here in Colombia, here is my grandmother and my aunts. I like being here because I have more friends. As a birthday present, I was brought to Colombia, we arrived by plane, I traveled with my grandmother. When I arrived in Bogotá, we moved in with my aunts. (Joseanny, personal communication, April 15, 2022).



**Figure 7.** *Photo of Joseanny tracing in the art workshop: What if you ask me?*

The narration of Joseanny and the drawing she made was told to other children that she and Adriel invited to the workshop, including some cousins. This shows their capacity for reflection and assemblage on their migratory process. Adriel said that two of the reasons for his migration to Colombia were also for protection and economic reasons "[...] they were looting a lot in Venezuela [...] my mother was not working in Venezuela and my father sent money, but she said that it was not enough" (personal communication, April 15, 2022). It was also noticed that Joseanny, her mother's loneliness also influenced them to make the decision: "[...] my mother was bored because she said that she missed my father very much" (personal communication, April 15, 2022).

The perception that the boy and the girl have on their migratory process shows that they are not part of economic, social and political causes that they may suffer as families and that encourage their migration from Venezuela to Colombia. However, narratives and different expressions of art they made reflect that their core is in the joy of family reunion, to have new experiences in a new school and meet new friends. The way to face the migratory journey was surely not as difficult as if it may have been experienced by other migrant children, this introduces in the next section their assemblage practices in the migration process.

## **An Experience of Assemblage from the Capabilities**

For Pavez-Soto and Sepúlveda (2019), children as agents freely and thoughtfully express the perceptions they have of life and the world around them, the contexts they live in everyday life, and, they reveal what it represents for them to live a dignified, happy and full life. The perspective of children in the analysis of this research, as they are in the first place, allows altering the social order. According to Mayall (2002), to give children's voices a place is an essentially political act that favors their social status and greater consideration for their rights. The author states that the moral reasoning of children and young people must be respected, and the recognition of their assemblage, which is the gateway to respect the rights to the field of social participation and the recognition of other capacities they have.

It was found in Adriel and Joseanny some of their assemblage practices, seen as capacities in the migratory process, such as: capacity for affiliation, adaptation, autonomy, identity, and sense of belonging.

This research emphasizes on the capacities of children that enable them to be agents of their own experience, it relates to Nussbaum (2012): Human development seen from the perspective of capacities is like "[...] an approach to a set of questions about the quality of life and basic justice" (p. 40). This is taking into account that some of the children's expressions shows that migration to Colombia allowed them to improve their living conditions, especially in the affective and relational context.

However, by "capacity for affiliation" Gómez (2016) states that it is "[...] understood in relation to living with and for others, to be able to socialize, to interact" (p. 10).

Joseanny said: "[...] I like to make new friends, I like being here because I have more little friends" (personal communication, April 15, 2022). Adriel and Joseanny show how their capacity for affiliation unfolds in unknown territories. They are not narrated from fear for what they do not know, but from the joy of meeting new people and having new experiences. Since the assemblage of Deleuze and Guattari (2004) allows us to understand that both, Joseanny and Adriel, have been in constant movement, their presence and future have not been given in an unchangeable way. They have the ability to act, decide and express what happens to them in different territories they have inhabited.

Adriel and Joseanny express ideas that allow to realize the full life they are living and the quality of life they have in their socialization environments. This allows the construction of platforms of affection, as Gómez (2016) says "[...] they constitute the social bases of self-respect and avoidance of humiliation and contempt" (p. 10). In this way, to feel that they are well treated at school by



their friends makes it possible for Adriel and Joseanny to be recognized as equals within their cultural differences, the ones that sometimes create hostile spaces of coexistence for children in schools.

Adriel and Joseanny's capacity for affiliation also shows how they are able to influence the processes of their interactions. Their assemblage constituted in feelings of belonging that allow them to feel part of a school, of some friends, follow patterns of relationship, influence and negotiation with other peers as agents in the context of their relationships.

Regarding her ability to adapt, Joseanny states: "[...] I have little friends here at school and I learn, I learn a lot" and "[...] I like being close to my family" (personal communication, April 15, 2022). It is related to Casas (2006) who states that: "[...] children understand that situations are difficult, they see danger and react, but they also learn from what they live and what they see" (p. 97). For migrant children, changes and transformations in their family and relational lives are a constant, they learn from the world around them, but they also make changes in the new routines, friends and experiences. This ability allows them to be flexible and adjust their socialization practices.

So far, Joseanny and Adriel's narratives and artistic productions have found a complex plot of their experiences and a great depth in their ways of thinking, feeling and expressing. As Malaguzzi (2001) says, who from a pedagogical proposal discusses the complexity of childhoods, they are marked by creativity and multiple languages of art. This demands adults to listen actively and constantly to discover their desires, voices and feelings.

Now, related to the construction of identity and the sense of belonging that Joseanny and Adriel have built, Adriel mentions: "This is Venezuela, here we were born, you do not remember because you are very small, but I do remember, here there are many birds and many rivers, here in Soacha there are no rivers" (personal communication, April 15, 2022). This narrative of Adriel was told to other younger children who he invited to one of the workshops, in which Family Day was celebrated. There was an environment related to Venezuela; there was music, images and typical dishes. Children were seen as transmitters of culture.



**Figure 8.** Photo of family members and Adriel on Venezuelan Family Day Art Workshop: What if you ask me?

Adriel and Joseanny told other children about their life in Venezuela, what they missed about their country and what they liked about both Colombia and Venezuela. All this through art, as Álvarez and Domínguez (2012) explain,

art is a tool for interpersonal development, expression of ideas and feelings, promotion of social and cultural changes. As a tool, it facilitates self-knowledge and self-evaluation, as it creates broader and more analytical perceptions of reality. (p. 117).



**Figure 9.** Photo of family members invited to the Venezuelan Family Day. Art Workshop: What if you ask me?

To conclude with this section, it is important to mention how in different co-creative workshops in the fieldwork with Joseanny and Adriel their autonomy was always present. They were a free boy and girl responsible for their actions, builders of their identity and subjectivity, capable of expressing their emotions, of being, and acting in the world, and with the ability to reflect on their own experiences. Contrary to the traditional concept that defines children as passive subjects, subjects that belong to adults, they turned what can be insignificant in the eyes of an adult, into the largest, most surprising and complex.

This research shows how Adriel and Joseanny, from an early age, are constructed and deconstructed in their everyday life of their migratory process as agents of their own lives, capable of actively participating in the construction of their identities. They generate valid views about their social world, that are entitled to participate in. MacNaughton et al. (2007), state "[...] children as social actors have valid ideas, values, and understandings of themselves and others and their world, and they can act as peers with adults to develop new policies and practices" (p. 460).

## Conclusions

In this research, children act as co-creators and theory of Mannay (2017) is used for the interpretation of the «narratives», thus, the conclusions focus on the contributions to people, programs and institutions that work with migrant children in everyday life, it aims to discuss or have new interpretations of the results.

The findings allow us to establish that there are great challenges in moving away from the adult-centric perspective that researchers have when working with migrant children. It was evident how the review showed negative effects and consequences of migration from the perspective of the adult. The exile, economic, social, political and cultural scarcity and refugees that families have to go through when they migrate to another country increase the production of knowledge generated in this field. This does not mean that it is not true, the voices and experiences of the children, with their parents or caregivers on this journey, have been lost of their sight.

These gaps in the production of knowledge in migration have effects on the way in which children are accompanied from humanitarian care programs, where they assumed from lack and deficit. There is a focus only on the needs of adults, it makes children invisible, without realizing that they can assume migration

from other views. This research demonstrates, from the capacity of assemblage, that they have and develop in their nearby spaces of socialization. In this way, the analysis of the phenomenon of migration from the comprehensive approach reveals diverse and deep complexities. Joseanny and Adriel's voice and experience would have an important place for their understanding that could also go beyond the ways of accompanying them, helping and learning from them.

The strategies of social organizations, whether governmental or non-governmental, are mediated by how they perceive children and the social construction they make of them. Therefore, it is too important to ask: How are migrant children being seen? only as victims? only as subjects of rights? children who require only humanitarian attention? Alvarado et al. (2012) mention that we cannot still see people from a single perspective "[...] the same subject and the multiple ways of being a subject are constructed and controlled in language-mediated interactions that make sense in a specific culture" (p. 206). Therefore, the complex gaze of children is required to allow the expression of their plurality, diversity, differences and potentialities.

[...] several "selves" are constructed from the narratives made by others about oneself, that are internalized in social relationships in different contexts of daily life, with different people and different interactions and conversations. (Alvarado et al., 2012, p. 206).

In this way, if organizations that work with migrant children still see them only as victims, or as subjects of rights, their actions and strategies they design for them will only have the assistance intention of filling the gaps and ensuring their well-being. This is very good and necessary in the vulnerable contexts in which children usually are, however, we must get a more holistic and inclusive approach that allow children to be seen as subjects of assemblage with capacities and potential, and facilitate them to live migration in multiple ways.

Therefore, this would make it possible to learn from them to the extent that they make their own decisions and express their opinions, emotions and feelings. This way of seeing children as political subjects would allow organizations and their social programs to take them into account in their planning and social intervention processes, as proposed by Alvarado et al. (2012):

[...] can become agents capable of unfolding their potential with others to build better forms of relationship between human beings, the physical and the symbolic world, through the creation of a type of life policies that connect polarized dimensions, such as: spirit and body, emotion and reason, thought and affection, inside and outside, public and private (p. 227).

Thus, organizations that work with migrant children are invited and challenged to listen to them, to recognize them in the midst of their capacities and potentialities, to validate their ideas as to what they need and would like to have, to make them part of the characterization processes, not only as numbers or percentages, but from the very recognition of their subjectivity and identity. Only in this way it will be possible to overcome welfare views and achieve approaches that provide artistic, recreational, creative, cultural, political scenarios, among others, and allow the deployment of their potential and the construction of comprehensive and differential care policies for the best of children.

This participation of children within social programs becomes a transformative power of societies, where they are the cores of social policies, which founds the democratic state in a broad sense of the social concept. Children as democratic subjects with capacities for affiliation, adaptation, sense of belonging, autonomy and identity, as demonstrated by this research, and from their capacity for assemblage, require a broad society, recognizing plurality and diversity, where there is the possibility of letting children be, of empowering them from their own capacities and of accompanying them in this process.

Finally, at the beginning of this research, the encounter was not anticipated with experiences that were assimilated to the way of living the migratory process. It was a meaningful discover in both Joseanny and Adriel the experience of assemblage that, in one way or another, demystifies the traditional ways in which children have sometimes been seen. In addition, this brings into play a different way of how human beings interact with others and with the world around them, such as the “[...] increase in dimensions in a multiplicity that necessarily changes in nature as its connections increase” (Deleuze & Guattari, 1980, p. 14).

This also leads to lines of flight, ruptures and alternatives of identities of children who also challenge adults to see and relate to them as actors and agents of their own lives. Childhood can have or propose valid meanings of the world and the places they live in. Thus, the knowledge and significance they attribute to their world is different and not less to the knowledge of adults. New and rich experiences and understandings of children's realities can be derived by seriously contemplating the views and perspectives of children.

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# School Inclusive Education in Latin American Migrants: A Systematic Review\*

[English version]

Inclusión educativa escolar en migrantes de  
Latinoamérica: una revisión sistemática

Inclusão educacional baseada na escola de alunos  
migrantes na América Latina: uma revisão sistemática

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## Abstract

**Objective:** The research aimed to systematize findings on school inclusive education in migrants from Latin America. **Methodology:** Seventy-two scientific papers from EBSCOhost, Redalyc, Dialnet, and SciELO databases were analyzed following the PRISMA criteria. The content was classified by a data extraction matrix to conduct the analysis and the creation of categories. **Results:** Access for migrant students is favored but there are no conditions to promote their retention in education institutions against administrative obstacles, discrimination, and socio-emotional impacts, and also linguistic and cultural difficulties. Teachers try to adapt their teaching approaches to promote inclusion with scarce resources and training but sometimes they just limit it to integration. Moreover, migration impacts family structure and students' levels of education. **Conclusions:** Education systems face challenges in the implementation of education policies to ensure effective inclusion. The need for a comprehensive approach that includes academic achievements, and the needs of the education community is highlighted.

**Keywords:** schoolchildren; migration; inclusive education; Latin America; cultural diversity (obtained from UNESCO thesaurus).

## Resumen

**Objetivo:** la investigación tuvo como objetivo sistematizar los hallazgos sobre la inclusión educativa escolar en migrantes de Latinoamérica. **Metodología:** para realizar esta revisión, se analizaron setenta y dos artículos científicos provenientes de EBSCOhost, Redalyc, Dialnet y SciELO como bases de datos para la búsqueda de información, siguiendo los criterios del protocolo PRISMA. El contenido se clasificó mediante una matriz de extracción de datos para realizar el análisis de resultados y la creación de categorías. **Resultados:** si bien se favorece el acceso a los estudiantes migrantes, no existen condiciones que promuevan su permanencia en los planteles

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educativos, ya que enfrentan obstáculos administrativos, discriminación e impactos socioemocionales, así como dificultades lingüísticas y culturales. A pesar de la escasez de recursos y capacitación, los docentes intentan adaptar sus enfoques de enseñanza para promover la inclusión, aunque en ocasiones se limitan a la integración. Además, la migración impacta en la estructura familiar y afecta el nivel de apoyo educativo que reciben los estudiantes. **Conclusiones:** es posible afirmar que los sistemas educativos enfrentan desafíos en la implementación de las políticas educativas para garantizar una inclusión efectiva. Se destaca la necesidad de un enfoque integral que considere tanto los logros académicos como las necesidades de la comunidad educativa.

**Palabras clave:** escolares; migración; educación inclusiva; América Latina; diversidad cultural (obtenidos del tesoro de la UNESCO).

## Resumo

**Objetivo:** o objetivo da pesquisa foi sistematizar os achados sobre a inclusão educacional em escolas para migrantes na América Latina. **Metodologia:** para realizar esta revisão, setenta e dois artigos científicos do EBSCOhost, Redalyc, Dialnet e SciELO foram analisados como bases de dados para a busca de informações, seguindo os critérios do protocolo PRISMA. O conteúdo foi classificado usando uma matriz de extração de dados para a análise dos resultados e a criação de categorias. **Resultados:** embora o acesso aos alunos migrantes seja favorecido, não há condições que promovam sua permanência nas instituições educacionais, pois eles enfrentam obstáculos administrativos, discriminação e impactos socioemocionais, além de dificuldades linguísticas e culturais. Apesar dos recursos e do treinamento limitados, os professores tentam adaptar suas abordagens de ensino para promover a inclusão, embora às vezes elas se limitem à integração. Além disso, a migração tem impacto na estrutura familiar e afeta o nível de apoio educacional que os alunos recebem. **Conclusões:** é possível afirmar que os sistemas educacionais enfrentam desafios na implementação de políticas educacionais para garantir a inclusão efetiva. Destaca-se a necessidade de uma abordagem holística que considere tanto o desempenho acadêmico quanto as necessidades da comunidade educacional.

**Palavras-chaves:** crianças em idade escolar; migração; educação inclusiva; América Latina; diversidade cultural (obtidas do thesaurus da UNESCO).

## Introduction

Research on migration throughout history confirms that population movements are an intrinsic quality of human condition, they leave their place of origin to settle in another country. Latin America and the Caribbean considerably increased in migratory movements, out of the region and between neighboring countries, they have been influenced by geographical proximity and a shared history in economic, political, and social issues (International Organization for Migration, 2019; Vega, 2017).

Between 2010 and 2020, South America received 10.9 million migrants, approximately 25.7% under 14 years. This shows the diversity and dynamism of population movements in the region (Global Migration Data Portal, 2021). Migration not only involves socio-economic and cultural implications, but also education issues that significantly impact the receiving communities: adult population, children and adolescents (Entrena, 2012).

To address school education for migrants, it is essential to define the term “inclusive education”, a main principle that seeks access and equity in learning. Its main objective is to abolish mechanisms of exclusion and discrimination rooted in institutional culture by fostering dialogue between curricular knowledge and cultural identities, and developing intercultural competencies, especially among teachers and students (Lázaro et al., 2022; Veloso, 2022; Jiménez et al., 2017b).

Echeita (2008) highlights that inclusive education represents an aspirational value that treats everyone equally and is not just an ideal, but rather demands adapting learning processes to each student's specific skills. Booth and Ainscow (2000) add that inclusive education demands changes in teaching methods, curricular adaptations, and a review of policies and administrative procedures to ensure genuinely inclusive education.

Intercultural educational inclusion in Latin America, according to Tomé and Manzano (2016) reveal that nineteen Latin American countries have incorporated intercultural values into their basic education laws and, although these vary between countries, they share common strategies. Venezuela stands out as a leading country in promoting these values, while Cuba and Ecuador show less implementation. Although they acknowledge the relevance of inclusion and interculturality in the curriculum, these countries have not managed to incorporate these principles into teacher training or establishment of school institutions able to meet these needs autonomously.

The findings of documentary research by Sánchez (2021) on comprehensive policies aimed at school inclusion of migrants in Latin America between 2004 and 2020, it shows that, although this inclusion has improved for children with special education needs, social exclusion issues for migrant students still persist. Additionally, there is a noticeable lack of information on diversity care that leads to ongoing cases of rejection and exclusion in schools.

Therefore, basic school education for migrants in Latin America is a crucial challenge that requires cooperation between governments, education institutions, teachers, and community to ensure equity in access to quality education that guarantees equal opportunities (López, 2016; Díaz, 2017). As a result, attending school does not guarantee quality education, as it does not efficiently address the specific needs of each migrant student (Groisman & Hendel, 2017).

On the contrary, in the United States, Segal (2018) states that equitable access to public school is a right for the young population. Government and non-government are allocated resources to improve the chances of a successful adaptation.

As the goal of this research is to systematically organize the current research on school inclusive education of migrants in Latin America, several aspects related to inclusive education were addressed. Institutional policies and strategies, teachers' pedagogical strategies and their challenges, intercultural educational conflicts, and the role of migrant families in the inclusive education process were some of these aspects.

The relevance of this review lies in its contribution to the academic field, as to date, the literature on the subject has focused on analyzing public policies related to school inclusive education for migrants in the region, without specifically addressing the strategies and challenges of migrant inclusion in school communities in Latin American. Within a context of global transformation, society and schools are facing significant changes, it is essential to reevaluate and adjust the approaches in the education process to ensure greater equity for this population.

## Methodology

A systematic review was conducted to analyze and synthesize available scientific information to increase the validity of individual conclusions and identify possible research needs. The PRISMA method was used to achieve the objective (Page et al., 2021). For eligibility inclusion, some criteria were established: access to paper full text, publication year between 2012 and 2023, papers in Spanish, English, and Portuguese, and inclusion of population actors from the education community who work with migrant students. Research whose main topic was not the inclusive education of migrants, not include Latin American population, not meet the publishing year criterion, not empirical research, and not involvement of school students were exclusion criteria.

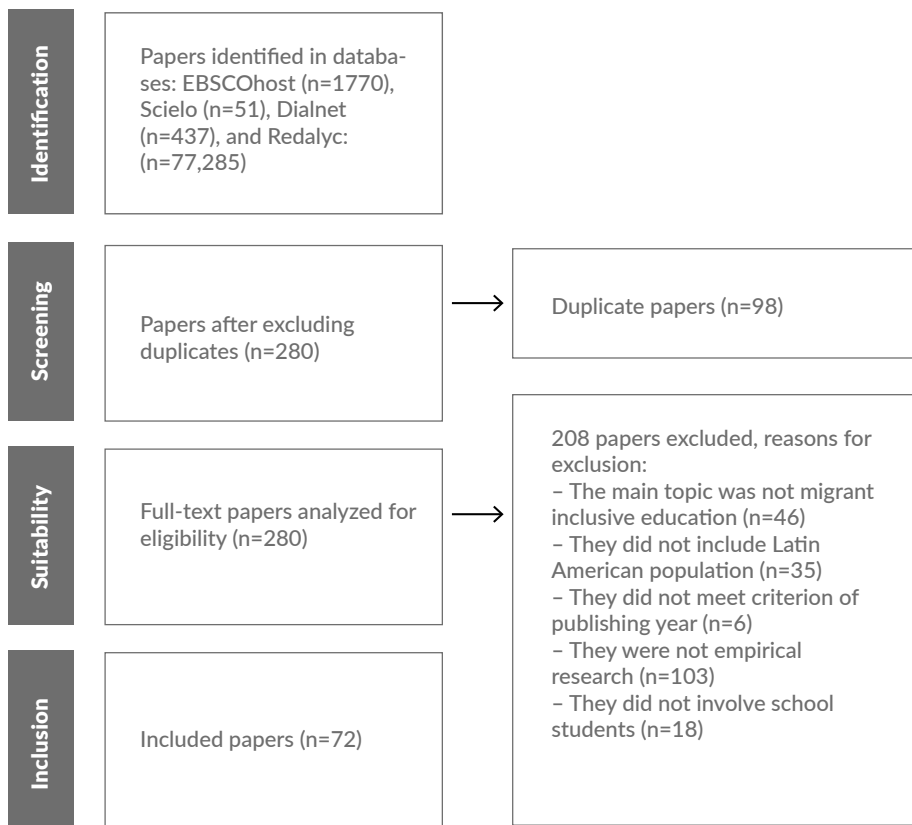
EBSCOhost, Redalyc, Dialnet, and SciELO were selected for searching information using these keywords: 'Migration' AND 'Education' AND 'Migrant Inclusive Education' AND 'Latin America' and their equivalent expressions in Spanish, English, and Portuguese as a search strategy. The selection of papers took into account title, abstract, or keywords. The search for information was conducted continuously from January 15 to September 20, 2023.

For the data collection process, an information extraction matrix was used. It included a total of 72 references for the analysis and creation of categories.

## Results

The process of preparation is described in different stages according to the PRISMA 2020 Statement (see figure 1).





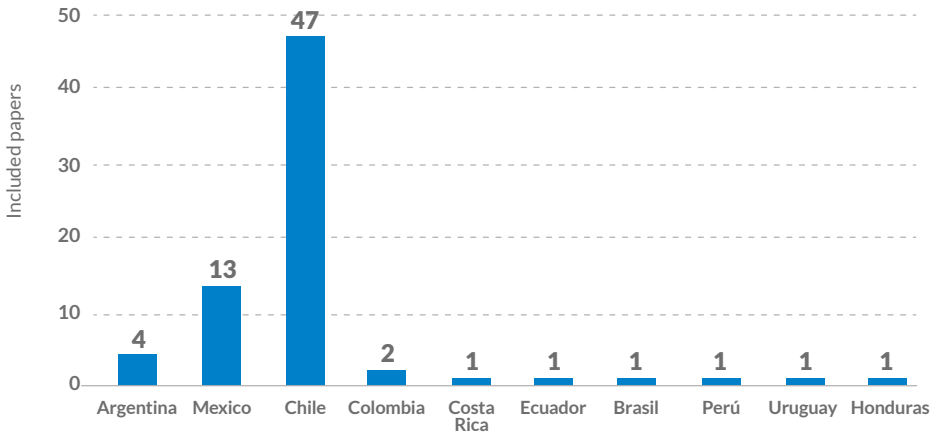
**Figure 1.** Flowchart for papers selection process.

Source: self-elaboration based on PRISMA (Page et al., 2021).

## Descriptive results

The following presents the results on year, techniques or instruments, database, participants, language, methodology, and countries.

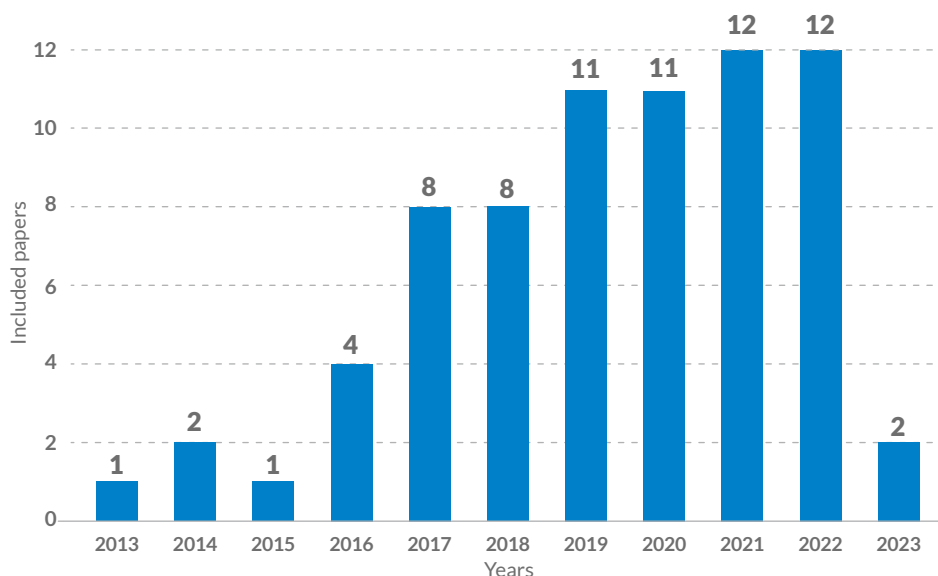
Regarding the countries, Chile had the highest number of publications (65.2%) and then Mexico (18%) (see figure 2).



**Figure 2.** Relationship between the countries and the total of papers.

About language, Spanish had the highest representation (93%), then English (5.5%) and Portuguese (1.3%). About databases, most of the publications were in Redalyc (34.7%) and Dialnet (29.1%), then SciELO (23.6%) and EBSCOhost (12.5%). About methodology, qualitative paradigm reported (72.2%), mixed (16.6%), and quantitative (11.1%).

The years with the highest publication were 2021 and 2022 (16.6%) that shows a growing research interest. However, academic production has experienced fluctuations over the years (See figure 3). The most frequently used techniques and instruments were several types of interviews (80.5%), focus groups (30.5%), observation (29.1%), scales, surveys, and questionnaires (26.3%), and document review (16.6%).



**Figure 3.** Relationship between the years of publication and the total of papers.

The number of participants ranges from 1 to 20 (37.5%), 24 to 79 (23.6%), and more than 100 (13.8%). Some research did not specify the exact number (25%).

It is highlighted that research include migrant students, nationals, teachers, administrative staff, and/or guardians to analyze the contexts and situations related to inclusive education of this population.

## Analysis

To achieve the goal of this systematic review, each of the categories obtained in the information extraction matrix is presented below. This provides a broader perspective to identify several significant challenges in community education of migrant students in Latin America.

### Institutional Policies and Strategies.

In several contexts, efforts have been implemented to promote inclusive education. In Argentina, Ecuador, Chile, Mexico, and Colombia, it was found that mere inclusion and attendance of migrant students in education institutions is not enough. Although the law allows enrollment without full documents, this is not

always enforced because there is not a standardized protocol, and it seriously affects their right to education. Moreover, the disparities in academic curriculum affects their inclusion, as they are enrolled in a lower education level that affects their confidence in their knowledge (Millán et al., 2021; Taruselli, 2020; Valdéz et al., 2018, Cigarroa et al., 2016; Delgado et al., 2020; Poblete, 2018; Bustos & Díaz, 2018).

Another aspect is the need to adjust migrant education policies and interventions in Mexico and Chile, an approach that encompasses not only academic achievements but also socio-emotional needs. Some initiatives are criticized for focusing mainly on administrative difficulties, thus, other important factors such as academic level, Spanish language ability, and familiarity with the national school system are ignored. It is recognized that cooperation between the school, the State, and civil society is relevant for establishing a common language in education (Franco, 2014; Fierro & Urtubia, 2022; Poblete & Galaz, 2017; Lahoz, 2021; Muñoz et al., 2021; Gómez & Sepúlveda, 2022; Cerón et al., 2017; Salas et al., 2021; Aguilera et al., 2023; Córdoba et al., 2022; Jara & Vuollo, 2019; Castillo et al., 2018).

In some institutions in Chile, Mexico, and Ecuador, the need to address linguistic and cultural difficulties in education policies for migrants is highlighted. It includes teacher training and language policies, and the language barrier that can be a problem in the classroom and school abandonment (Beniscelli et al., 2019; Poblete, 2018; Herrera & Montoya, 2019; Mellado et al., 2021; Hernández, 2016; Campos, 2019; Flanagan et al., 2022; Salas et al., 2021; Pavez et al., 2019b; Franco, 2014; Toledo et al., 2022; Delgado et al., 2020; Romo et al., 2020; Morales et al., 2022; Rodríguez, 2020; Ramírez & Gómez, 2023; Camacho & Vargas, 2017).

In different education contexts, actions have been implemented to overcome these barriers, such as the School Integration Program (SIP) in Chile, originally designed for students with special needs (Aguilera et al., 2023). However, some actions, such as authoritarian discipline in Chile and Mexico, tend to homogenize education towards local culture. This makes student responsible for school adaptation and transition to an intercultural school that becomes more difficult (Bustos & Pizarro, 2017; Beniscelli et al., 2019; Rodríguez, 2021; Bustos & Gairín, 2017; Jara & Vuollo, 2019; Pincheira, 2020; Romo et al., 2020).

Chile, Mexico, Brazil, and Argentina have been implemented other initiatives to make diversity visible and promote inclusion in school environment; some actions such as intercultural festivals, culinary showcases, dances and anthems from different cultures, and pedagogical projects on valuing their rights (Campos, 2018; Jiménez & Fardella, 2015; Kohatsu et al., 2020; Catalán, 2021; Cerón et al.,

2017; Flanagan et al., 2022; Valdés et al., 2019; Segovia & Rendón, 2020; Beniscelli et al., 2019; Martínez, 2016).

### **Teaching Pedagogical Strategies and their Challenges.**

In Colombia, Argentina, Chile, and Mexico, teachers face challenges in fulfilling an active role in identifying and addressing the issues to impact migrant students for lack of preparation and skills to address multicultural diversity (Millán et al., 2021; Médor et al., 2022; Gelber et al., 2021; Valdéz et al., 2018; Poverene, 2017; Pavez et al., 2019a, 2019b; Cigarroa et al., 2016). The authors insist that continuous training and intercultural awareness are necessary for professional development (Cerón et al., 2017; Franco, 2014; Herrera & Montoya, 2019; Campos, 2018; Aravena et al., 2019).

A particular difficulty in Colombia, Mexico, and Chile is the overcrowding of students, especially in public institutions. This situation and scarce economic resources affect teachers' participation in training programs (Millán et al., 2021; Herrera & Montoya, 2019; Ramírez & Gómez, 2023; Henríquez, 2022; Cigarroa et al., 2016).

In Chile and Ecuador, despite the promotion of an intercultural educational model, they acknowledge the lack of theoretical and conceptual foundation for its implementation. Some Chilean school environments tend integration rather than inclusion, and the responsibility of achieving true inclusion falls on teachers; they face obstacles like a lack of resources and effective competencies, as public policies do not always correspond to the reality of the classrooms (Pincheira, 2020; Delgado et al., 2020; Joiko & Vásquez, 2016; Henríquez, 2022; Alarcón et al., 2020; Segovia & Rendón, 2020).

Despite these challenges, in Chile, Mexico, and Brazil, teachers have made efforts to adapt the curriculum and teaching strategies using expository and interactive teaching approaches. They have developed and translated worksheets and itineraries for interdisciplinary research to promote inclusion and equality (Alarcón et al., 2020; Ramírez, 2022; Poblete, 2018; Kohatsu et al., 2020; Valledor et al., 2020). On the contrary, some teachers in Argentina and Chile do not see the need to use strategies, as they do not associate migration with learning problems (Pozzo & Segura, 2013; Bustos & Díaz, 2018).

In this context, in Chile, Mexico, and Honduras, teachers promote participation and cultural exchanges in the classroom based on their personal knowledge, through respect, solidarity, active listening, games, and music. They perceive these experiences as a valuable source of information about current events, traditions, and cultural realities, as it provides an opportunity to address

diversity, improve their teaching practices, and enrich the classroom curriculum (Hernández, 2016; Mora, 2022; Flanagan et al., 2022; Ramírez, 2022; Gluckman et al., 2021; Herrera & Montoya, 2019; Fierro & Urtubia, 2022; Cerón et al., 2017; Salas et al., 2021; Aravena et al., 2019; Muñoz et al., 2021; Beniscelli et al., 2019; Toledo et al., 2022). In Uruguay, teachers have implemented Information and Communication Technologies (ICT) to approach the diversity of students (Da Silva et al., 2019).

In Mexico and Honduras, in response to linguistic and cultural diversity, teachers use new visual strategies, promote cooperation among students, and allow them to complete tasks in their native language. They recognize that traditional approaches may not be suitable and that academic performance should not be measured by a language they do not master (Zambrano & Ávila, 2018; Gluckman et al., 2021; Franco, 2017; Rodríguez, 2020). Chilean teachers use welcome classrooms, differential groups with a migrant focus, student tutors, and interactive groups, they consider the language barrier as an opportunity to enrich culture and mutual understanding (Campos, 2018; Romo et al., 2020; Campos, 2019; Pavez et al., 2019b; Valdés et al., 2019; Jiménez et al., 2020).

In Mexico and Chile, several perspectives among teachers to migrants in the classroom are identified, and have been accused of affecting local families and academic levels. This has led to the implementation of exclusionary strategies, such as grouping migrant students to avoid delays in the group (Salas et al., 2017; Segovia & Rendón, 2020; Cerón et al., 2017; Jiménez & Fardella, 2015; Cigarroa et al., 2016).

However, in Chile, Brazil and Argentina, some teachers perceive migrant students positively, describing their performance as equal to or higher than local students. They attribute this to motivation, family upbringing, and social acceptance need, they state that students' nationality should not be associated with their performance (Bustos & Mondaca, 2018; Bustos & Gairín, 2017; Bustos & Díaz, 2018; Pozzo & Segura, 2013; Kohatsu et al., 2020; Beniscelli et al., 2019).

### **Intercultural Conflicts in Education.**

In Chile, Mexico, Colombia, Argentina, and Peru, discrimination and exclusion are common experiences for migrant students who face xenophobia, racism, prejudice, stereotypes, and hypersexualization. They are often victims of verbal violence, mockery, physical assaults, and questioning of their social rights by their local peers, teachers, and/or communities. Discrimination reasons vary, gender, language skills, physical appearance, ethnic origin, and nationality are some of the most common ones. These affect their academic performance and school

adaptation (Millán et al., 2021; Stang et al., 2021; Médor et al., 2022; Ramírez & Gómez, 2023; Rodríguez, 2020; Taruselli, 2020; Andreucci et al., 2021; Caqueo et al., 2019; Herrera & Montoya, 2019; Bustos & Díaz, 2018; Rodríguez et al., 2022; Poblete & Galaz, 2017; Hernández, 2016; Flanagan et al., 2022; Bustos & Pizarro, 2017; Pavez et al., 2019b; Salas et al., 2021; Pozzo & Segura, 2013; Poverene, 2017; Ledesma et al., 2018; Gelber et al., 2021; Pavez et al., 2019a; Martínez, 2016; Muñoz et al., 2022; Cigarroa, et al., 2016).

Several studies in Chile and Mexico have highlighted that migrant and national students reflect beliefs and values of their families and social environments in their behavior (Toledo et al., 2022; Pavez et al., 2019b; Bustos & Gairín, 2017; Bustos & Díaz, 2018; Campos, 2018; Cigarroa et al., 2016).

To address these issues, they have implemented strategies in different contexts. In Chile, the role of school mediator and teachers is highlighted to prevent offenses based on nationality (Valdés et al., 2019; Beniscelli et al., 2019). In Colombia, solidarity networks have been built between families and schools, they highlight the involvement and leadership of students against discrimination (Rodríguez et al., 2022). Students in Chile show empathy and solidarity towards their migrant peers, especially those with histories of conflict in their countries of origin, they take a role of protection and integration (Catalán, 2021; Campos, 2018; Campos, 2021; Saldivia & Médor, 2020).

On the other hand, there are effects of migration on psychological well-being. In Colombia and Chile, it is evident that school migrants face a migratory grief, caused by their family distant relationship, friends, and significant environments, and cultural shock between national and foreign students (Fierro and Urtubia, 2022; Millán et al., 2021; Rodríguez et al., 2022, Campos, 2018). Costa Rica and Mexico remark the need to provide psychological support to migrant students, they consider the impact on their socio-emotional and educational development (Artavia, 2020; Salas et al., 2021).

Finally, although students value their closeness with teachers and the kindness in Chilean schools, they consider it necessary to improve empathy and recognition of their efforts, especially in evaluations (Bustos & Mondaca, 2018; Sanhueza et al., 2014). Students taken back to Mexico perceive the education structure as authoritarian and fear that their learned behaviors in the US will be misunderstood and disrespectful (Franco, 2014; Franco, 2017; Ramírez & Gómez, 2023).

## **Migrant Families in Inclusive Education.**

Migration influences family structure, and therefore, social and academic adaptation of schoolchildren in Colombia, Chile, and Mexico. This transforms traditional families into transnational ones, and affects the availability and parents support for active upbringing of their children (Millán et al., 2021; Ramírez & Gómez, 2023; Andreucci et al., 2021; Joiko & Vásquez, 2016; Camacho & Vargas, 2017; Lahoz, 2021; Salas et al., 2021).

Moreover, in Mexico, Argentina, and Chile, families must face cultural and linguistic differences that affect school adaptation and academic performance. They propose solutions like Spanish courses, bilingual teachers, use of technology, cultural mediators, teaching local languages independently, hiring teachers, or choosing private schools (Franco, 2017; Pozzo & Segura, 2013; Salas et al., 2021; Toledo et al., 2022; Ramírez & Gómez, 2023; Rodríguez, 2020; Herrera & Montoya, 2019). In contrast, in Brazil, migrant parents value the quality of education and do not seem concerned about the loss of their mother tongue (Kohatsu et al., 2020).

Another aspect to consider is the socio-economic challenge for some migrant families from Mexico and Chile. This affects the education representation of students, as both parents tend to hold low-skilled jobs, with a heavier workload and lower income (Rodríguez, 2020; Rodríguez et al., 2022; Castillo et al., 2018). In Argentina, there is also concern about uncovered basic needs that affect the education process (Martínez, 2016). In Mexico, although some families prefer private education because it guarantees a higher quality education, the lack of resources leads them to choose a public school (Camacho & Vargas, 2017).

## **Discussion**

Governments recognize the right to education within the framework of human rights and the United Nations Sustainable Development Goals that promote inclusive and quality education (UNESCO, 2015). However, the findings reveal that the inclusive education of migrants in Latin America has significant challenges, like the lack of standardized protocols, curriculum adaptation, and biases in enrollment. While some countries, such as Chile and Colombia, have implemented decrees and regulations to facilitate access, these rights are not explicitly integrated into the internal structure of the education system. In contrast, Costa Rica and Uruguay have integrated these rights into their migratory legal framework, they promote inclusion. Argentina has an advanced immigration law but still faces



challenges in implementing inclusive policies to homogenize practices (Poblete, 2019). It is essential to maintain a governmental and institutional commitment centered on human rights to improve the effectiveness and coherence of education policies to school migrants in Latin America.

Legal regulations are fundamental for establishing policies and allocating resources to education, but they are not enough by themselves. Despite inclusive models proposed in the education system, Neira et al. (2021) report that these do not fully assume the responsibility of providing resources and improving education policies related to migration. According to Loyola (2020), the challenges of attaining inclusive education from resource inequalities and an economic system that does not fully guarantee the right to education. Thus, it is key that regulatory frameworks are clear and specific supported by adequate financial and human resources to ensure their implementation.

Despite identified actions in Latin American schools, like multicultural presentations, González (2021) highlights that only this does not ensure a quality education. It warns the risk of becoming mere folkloric representations without focusing on pedagogical innovations that ensure real inclusion. This differs from the official reception programs established in the European Union that promote the inclusion of migrant students and ensure academic achievement and equity of opportunities (Jiménez et al., 2017a). Most research focuses on integration rather than inclusion, it is essential to adopt a comprehensive pedagogical approach to ensure the inclusion of migrant students, mainly their well-being and academic development.

Despite the policies for access to the education system for migrant students, once they enter, there is no explicit guidance on how to implement inclusive practices in curricular or coexistence aspects (Poblete, 2019). Teachers face challenges in inclusively enrollment of migrant students with language and cultural barriers, overload, few training, and a lack of skills to manage multicultural diversity. Therefore, a comprehensive approach with teacher training is necessary, also aligned with the fourth goal on quality education according to *Agenda educativa 2030* (UNESCO, 2015).

In addition, Rodríguez (2019) suggests the implementation of collaborative work among the entire educational team to address current challenges more effectively. It is recommended to update the teachers training curricula so that future teachers are prepared to handle cultural and linguistic diversity in the classroom.

The discrimination against Latin American school migrants is clear, even when there is a common international framework like the "International Convention on the Elimination of All Forms of Racial Discrimination". (Poblete, 2019). There is also a remarkable effect on the mental health of migrant

schoolchildren. Neira et al. (2021) suggest that the migration process directly affects their academic performance and emotional well-being. Despite this, the education system does not provide the necessary support, leaving them at a disadvantage compared to national students. Therefore, it is suggested to align national laws with international conventions to protect the rights of school migrants.

According to this, migration impacts family dynamics, affects school adaptation for socio-economic challenges that influence education decisions and the level of school support. Despite government commitments to guarantee education regardless of families' immigration status, economic limitations can create inequalities (Lázaro et al. 2022). Although some migrant families choose alternative education strategies, it is essential that the school, the community, and the State ensure an inclusive and comprehensive supportive education environment.

## Conclusion

In Latin America, access to education is guaranteed in constitutions and legal frameworks, but the differences in how education rights are established can vary between countries. Therefore, the inclusive education of migrants in Latin America faces significant challenges like language barriers, difficulties in multicultural environments, and discriminatory acts. Moreover, teachers try to adapt the curriculum and teaching strategies, facing limitations in resources and skills to promote inclusion. Migrant families face socio-economic challenges that influence their education decisions and the level of school support. In the context of Latin American migration, these results question the education systems preparation and reflect challenges in the implementation of education policies to ensure effective inclusive education for school migrants.

It is vital to adopt a comprehensive approach that considers academic achievements and the needs of community school, through the development of education policies for migrants on human development and social inclusion, as mere access to education does not guarantee quality inclusive education.

It is suggested that future research focus on developing practical solutions that address the challenges and significantly contribute to the quality of inclusive education for Latin American migrant schoolchildren.

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# Research — on other topics

Investigaciones en otras temáticas  
Pesquisa sobre outros tópicos

## In Adoption, the Emotional Bond is Built: Does Love at First Sight Exist?\*

[English version]

En la adopción el vínculo afectivo se construye:  
¿existe el amor a primera vista?

Na adoção, o vínculo afetivo se constrói:  
existe o amor à primeira vista?

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**Colombia**

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Colombia

## Abstract

Family experiences of couples who adopted their children in Medellín through the ICBF are presented. **Objective:** To understand the meaning that couples attribute to how the affective bond was generated in the adaptation phase of their adoption process. **Methodology:** Qualitative, hermeneutic phenomenological approach, multiple case study typology, in-depth interview technique, open-ended question guide instruments, timeline. **Results:** The particularity of each experience in the construction of the affective bond with adopted children is reported. The adaptation phase extended over time and was described by the couples as an extremely intense stage, as bonding cannot be measured chronologically but is emotionally constructed within the intersubjective relationship. **Conclusions:** The complexity of the bonding process in adoption cannot be anticipated; emotional bonding is the result of a bilateral and patient approach by the parents, requiring affection, validation of emotions, and acceptance of everyone's vulnerabilities. In most of the cases studied, there was an asynchronous rejection by the children towards some of their adoptive parents, which generated feelings of frustration, disappointment, and hopelessness, and required coping strategies.

**Keywords:** adaptation; adoption; adoptive couple; rejection; affective bond (obtained from the UNESCO thesaurus).

## Resumen

Se presentan vivencias familiares de parejas que adoptaron a sus hijos en Medellín, a través del ICBF. **Objetivo:** entender el significado que las parejas atribuyen a la forma como se generó el vínculo afectivo en la etapa de adaptación de su proceso adoptivo. **Metodología:** cualitativa, enfoque fenomenológico hermenéutico, tipología estudio de caso múltiple, técnica entrevista a profundidad, instrumentos guía de preguntas abiertas, línea del tiempo. **Resultados:** se da cuenta de la particularidad de cada vivencia en la construcción del vínculo afectivo con hijos adoptivos. La etapa de adaptación se

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extendió en el tiempo y fue definida por las parejas como una etapa extremadamente intensa, dado que la vinculación no puede medirse cronológicamente, se construye emocionalmente en la relación intersubjetiva. **Conclusiones:** la complejidad del proceso de vinculación en la adopción no puede dimensionarse por anticipado, la vinculación afectiva es producto de un acercamiento bilateral y paciente por parte de los padres que requiere afecto, validación de las emociones y aceptación de las fragilidades de todos. En la mayoría de los casos estudiados se presentó el rechazo asincrónico de los niños hacia algunos de sus padres adoptivos, que generó sentimientos de frustración, desilusión y desesperanza, y exigió estrategias de afrontamiento.

**Palabras clave:** adaptación; adopción; pareja adoptiva; rechazo; vínculo afectivo (obtenidos del tesoro Unesco).

## Resumo

Apresentam-se vivências familiares de casais que adotaram seus filhos em Medellín, por meio do ICBF. **Objetivo:** compreender o significado que os casais atribuem à forma como o vínculo afetivo foi gerado na fase de adaptação do processo adotivo. **Metodologia:** pesquisa qualitativa, com abordagem fenomenológica hermenêutica, tipologia de estudo de caso múltiplo, técnica de entrevista em profundidade e instrumentos como guia de perguntas abertas e linha do tempo. **Resultados:** evidencia-se a singularidade de cada vivência na construção do vínculo afetivo com os filhos adotivos. A fase de adaptação se estendeu ao longo do tempo e foi definida pelos casais como extremamente intensa, visto que a vinculação não pode ser medida cronologicamente, mas é construída emocionalmente na relação intersubjetiva. **Conclusões:** a complexidade do processo de vinculação na adoção não pode ser prevista antecipadamente. O vínculo afetivo resulta de uma aproximação bilateral e paciente por parte dos pais, exigindo afeto, validação das emoções e aceitação das fragilidades de todos os envolvidos. Na maioria dos casos estudados, observou-se a ocorrência de rejeição assíncrona por parte das crianças em relação a alguns de seus pais adotivos, o que gerou sentimentos de frustração, desilusão e desesperança, exigindo estratégias de enfrentamento.

**Palavras-chave:** adaptação; adoção; casal adotivo; rejeição; vínculo afetivo (obtidos do Tesouro UNESCO).

## Introduction

Adoption in Colombia represents a broad spectrum and constitutes an inexhaustible source of knowledge. However, in the literature review, approaches were identified that are more focused on the legal aspect rather than the psychosocial realm, revealing gaps in the scientific production of the phenomenon within the local context. In this regard, Sánchez et al. (2012) suggest that “[...] it would be desirable [...] to initiate longitudinal studies that allow the peculiarities and needs that these families encounter in the initial moments of coexistence to be measured in *situ*” (p. 565). The approach to the experiences of adoptive families allows for the emergence of different and unique narratives, which are susceptible to being investigated from their intersubjectivity, providing an understanding of the adoption phenomenon and shedding light on what has yet to be said in this context.

The Colombian Law of Children and Adolescents agrees with the literature found, which conceives and understands “adoption” as “[...] a legal instrument that establishes a filial bond between a minor and their adoptive parents, equivalent to the biological bond for all purposes” (Moliner, 2012, p. 102). From the social perspective, it is seen as a positive option and the most desirable experience for children, as stated in the Code of Childhood and Adolescence (2006), Article 61, which defines adoption as “[...] primarily and above all, a protective measure through which, under the supreme supervision of the State, the paternal-filial relationship is irrevocably established between people who do not have it by nature”. From the moment the adopted child and their adoptive family meet, they embark on a journey together, facing challenges in building an emotional bond.

According to Berástegui (2007), the transition to parenthood, whether biological or adoptive, brings changes in roles and family dynamics. This is particularly reported in the case of adoptive families. The adoptive event is widely recognized internationally as a situation that often exceeds the ideals, plans, resources, and preconceived notions of adoptive parents. In this sense, it becomes a common source of stress, leading to transformations, requiring a shift in priorities, and demanding focus on the newly arrived child.

During the research, couples defined special moments that marked milestones in their adoption process. *Expectation*: the period between the moment of eligibility approval and the assignment of the child; *encounter*: a unique reality for each family; *rejection*: when the child showed a preference for one of the parents; *adaptation*: the initial period of coexistence that began the affective bond; *acceptance*: requiring the ability to let go, learn, agree, and self-regulate.

It can be affirmed that adoption is itself a transformative event, a learning process that arises from both recognition and empowerment, as well as the

experiences of the people involved (París, 2005). Therefore, it requires the desire to welcome the child (Rosser, 2015) and involves reflecting on one's own identity as adoptive parents (Montano, 2012). Under these premises, this study is pertinent, as it reveals previously unknown accounts of the intersubjective experiences of adoptive families that emerged naturally.

Thus, the guiding question of the research was: how was the emotional bond generated between the adoptive parents and the adoptive children? From this, the objective emerged to understand the meaning that couples attribute to the way the emotional bond was formed during the adaptation phase of their adoption process. During the research, the couples, as subjects of analysis, were the creators of their personal, relational, and parental history, through the content and forms in which they narrated their experiences. In this way, the contributions, findings, and insights gained from the study enriched the understanding of reality, both for the participants themselves and for those studying the adoption phenomenon.

## Methodology

This is a qualitative research study that sought, in accordance with Martínez's (2011) explanation, to understand the behavior of the individuals studied and interpret the meaning they attribute to their own behavior and that of others. This approach allowed the adoptive couples to have a voice in the research. Hermeneutic phenomenology is not a "[...] univocal or unidirectional approach, so its application demands a continuous attitude of discovery, knowledge, and interpellation" (Pérez et al., 2019, p. 28). By being chosen, it allowed for the expression of the meaning given to each adoptive experience based on its historicity, context, and interests.

The multiple case study was defined as relevant according to Yin's (2003) assertion, which states that when the research focuses on real-life contexts, the researcher has little control over the events and asks "how and why". In-depth interviews were conducted in which, according to Kvale (2011), the researcher asks questions and listens to what participants express about their experiences, sharing ideas, opinions, dreams, fears, and hopes to learn about the situation from the participants' own words. Open-ended and guiding questions, as well as a timeline, were used as data collection instruments. The timeline allowed for the graphic and chronological organization of the reconstruction of the stories. Additionally, the categorization, coding, and analysis were done manually.

The participating couples adopted their children between 2016 and 2018. By the time of the interviews (2021), they had completed the post-adoption

follow-up phase and had no ties to the ICBF which could have hindered their participation in the research.

The following criteria were considered for case selection:

1. Couples who opted for adoption as the first and only option (a rare case, given that, in many instances, couples first exhaust all possibilities of conceiving biological children).
2. Couples who adopted a child over the age of five (it is uncommon for couples to voluntarily opt for an older child, as the collective imagination tends to favor adopting infants).
3. Couples with second adoption (facing a second process, having gone through a previous experience, does not usually become an option).
4. Couple with a biological child who opted for the adoption of a pair of siblings simultaneously and surpassed generalized imaginaries.

The study was approved by the Ethics Committee of the Faculty of Medicine at the University of Antioquia and adhered to established protocols within the framework of the Universal Declaration of Human Rights, complying with the required ethical codes and standards. Each couple signed an informed consent form, and to preserve their privacy, they chose their pseudonyms. Case one: The couple self-identified as Atenea (Ate) and Marte (Mar), naming their child Mercurio, inspired by their affinity for Greco-Roman mythology. Case two: Mona (M), Rey (R), the biological son as “Mono”, and his daughter is called *Princess*, reflecting their everyday use of these names. Case three: The couple selected Isabel (I), based on religious beliefs, and Antony (A), for his rebellious nature; their children were named Juan and Sara. Case four: Yoko (Y), John (J), the biological son “Paul”, and the two children who came through adoption are “Linda” and “Sean”, for musical preferences. In the results section, their voices appear under the designated initials, followed by the number corresponding to each interview conducted during the study.

## Results

During the research, couples identified special moments that mark milestones in their adoption process, namely: the waiting period, assignment, encounter, rejection, adaptation, and acceptance.

### Case 1. Couple who Opted for Adoption as the First and Only Option.

The *waiting period* did not exceed four months. The meeting with their child was described by the couple as “[...] a shockwave, it’s an earthquake, it’s a seismic experience” (Ate1), and they considered that “[...] the adaptation phase is tough, extremely intense emotionally; we had a two-year-and-one-month-old child, and, the first three months were terrible” (Ate3). According to their account, their child arrived in a state of “[...] wild nature, he didn’t sleep properly, he hit me. The work of regulation was tough” (Ate3); and demanded transformations: “[...] we love our little one very much, but it was high voltage [...] these years have been a whirlwind of change; a loving whirlwind, but one that has shaken us completely and exposed our shadows” (Ate1). They also recognize the romantic side of this stage: “[...] very beautiful, very wonderful, that knowing our child” (Ate3), an ambivalence that showed that facing adoptive parenthood is a complex process.

*The rejection* occurred in the first days and was defined as a difficult situation: “[...] I was very bad, he saw me and started to cry, he didn’t want me to hug him, that was horrible” (Ate3); “[...] then he got attached to his mother and forgot about me, and I too went into crisis” (Mar3). It was necessary to go through these moments of parental stress individually and as a couple.

During the first months of *adaptation*, the family dynamics changed, “[...] the unimaginable happened [...] everyone came to visit Mercurio” (Ate3), and they changed their lifestyle: “[...] we have been a very closed couple, we have almost no friends, we hardly go out with people, we have almost no visitors” (Ate3). The crisis as a couple did not wait and lasted several months:

[...] That first year, until Marte got a job, we started arguing a lot, everything annoyed us, we were in a bad mood, we even started having disagreements regarding parenting, and Marte’s emotional intelligence deteriorated. (Ate1, personal communication, August 27, 2021).

As time passed, *acceptance* arrived and the couple began to recognize Mercurio’s abilities: “[...] as we got to know him, we were very surprised by his talent and intelligence” (Mar3); “[...] it was astonishing to feel so lucky to have been assigned such a wonderful child” (Ate3). They established agreements on the issue of parenting: “[...] with Mercurio, we never saw him as one of those

kids who throw tantrums in the street for no reason” (Mar3). Heteroregulation of emotions has been part of the process of accompanying your child.

## **Case 2. Couple with Biological Child who Adopted a Girl over Five Years Old**

Having openness in the age range minimized the *waiting time*: “[...] we received approval in May 2016, they told us we were on the waiting list, and the next day they said, ‘you already have the girl’, and we couldn't believe it” (M3). The *encounter* with their daughter meant “the shock” (R2), “[...] when they showed us the photo, we all started crying” (M3); confusion and joy arose simultaneously.

The attitude and openness of the older brother generated motivation in the girl: “[...] we went to a shopping center, our son was a success there” (M3). When they arrived home and disrupted their routine, there was a substantial change in the family dynamic: “[...] with the Mono we already had a routine and he was not very demanding over time, life was very quiet, he did not demand anything more from us. When the girl arrived, everything changed to accommodate the new objective” (R3), modifying schedules and activities counteracted the initial stress.

The couple faced the arrival of their daughter with empathy: “[...] my five-year-old daughter arrived, and it was as if she were a newborn. You have to learn to understand them, you have to give them confidence, love, and dedication” (M3). Empathy allowed them to understand and accept the girl's emotions and behaviors: “[...] I saw my girl crying and my soul broke” (M3). The parents were aware of the situation, identified the girl's expressions of discontent as part of the transition she had just undergone, supported each other, and placed their daughter as a priority.

*Rejection*: the girl accepted her new mother, but the same did not happen with the father: “[...] I had a breaking point because I did not feel appreciated by her at all, I kept trying everything possible, and she gave me nothing in return” (R3), a situation that lasted for three months. In the first moment of *adaptation*, there were shifts in attitudes: “[...] these are things that, even if they don't come naturally, one must learn” (M3); “[...] I was afraid of not being able to complete the whole process of adaptation of the girl with us” (R3). It required learning, understanding, and conscious acceptance.

The bonding process was presented asynchronously: “[...] I took a little longer because I had the Mono. It took about a year, but when I felt her as my daughter, I already felt that she was mine, mine, mine” (M3). The mother acknowledges that “[...] time told me, yes, yes, she is her daughter. At first, it's like she's borrowed, you don't feel she's yours, but over time that changes and

daily experiences shape your mindset” (M3). Living together made it possible to establish a connection between everyone, a bond recognized as a joint construction process that involved consciously embracing parenthood.

Regarding *adaptation*, having a biological child led the mother to feel she was being inequitable in expressing affection and treating her children: “[...] it was very difficult for me to learn to share my love equally between the two without leaning more toward one. Rey opened my eyes, and I reacted” (M3); “[...] when I gave so much attention to the girl, I felt guilty before my love was only for my son and now it was love for both” (M3). Mothering again created new dilemmas that were part of the bonding process.

The couple took responsibility for the situation: “[...] children should not feel like they are the problem; rather, the problem lies with us. While we adapt to the situation, we must support, protect, and understand that they are different and should never be compared” (M3). The empathetic and respectful attitude facilitated the connection and allowed the parents to give their daughter the differential treatment she needed: “[...] learn to understand her, because she comes from a very complicated situation” (M3), accepting the fragilities empowered the couple to respond to the girl's needs.

In *acceptance*, taking responsibility for their actions, feelings, and thoughts as adoptive parents facilitated the bonding process: “[...] the most important thing for me is to let go, everything has to flow. Not feeling bad about the feelings you have at the moment, not judging yourself, for me it was difficult to share love, and for the girl, it was difficult to start loving strangers” (M3). Feelings evolved, and love was built naturally, without being forced.

### Case 3. Couple with a Second Adoption

They adopted their first child in 2013, the *wait* was a long process, but “[...] waiting was worth it” (I2). Finally, after obtaining the final diagnosis, Juan was certified “[...] as a normal child with a small head, that was a celebration for us” (I2). In their second adoption, they felt they had already paved the way: “[...] in the process of our first child they realized who we were and what our commitment was”. The boy was also interviewed, and he said: “I was happy with my dad and my mom” (A3). Sara was adopted in 2018 when she was 23 months old, and the couple indicated the process was “[...] much more relaxed, but just as demanding” (I3); “[...] she was small and underweight and we said calmly that in the house she will recover! everything else was great” (I3). The previous experience provided them with the serenity to face reality.



*Encounter:* the day Sara arrived home “[...] she was not distant, she was very calm, let everyone carry her, but at night she saw her father and it was as if she were looking at an ogre” (I3). This situation required patience, understanding, and the search for strategies, to face *rejection*: “[...] as a parent, one must be very conscious and mature” (A3). They recognized that every adoption experience is unique, has its demands, and requires the couple to readjust and establish new parenting approaches.

*Adaptation:* Juan's arrival was very smooth, as if “[...] he was born here” (A2), although “[...] the routines are very different” (I3), there were no major disruptions. In the second adoption, “[...] we understood that everything in life is a process. That idea of love at first sight, that's just infatuation, not love because love in adoption is something that is built” (I3), a statement that contradicts popular belief. Furthermore, the adoption of two children brought learning such as “[...] becoming aware, because, beyond a romantic ideal of motherhood and fatherhood, a child proves one's sufficiency, every day” (I2), a situation that is similar in biological parenthood.

*Acceptance:* the arrival of each child had a different meaning, “[...] Juan has been happiness [...] Sara was the cherry on the cake” (I3); “[...] we are more and more in love with those boys every day, time with them has flown by” (A3). They have focused on affective balance: “[...] we have worked consciously not to have preferences for either” (I3), ensuring that each child has their rightful place.

#### **Case 4. Couple with Biological Child who Adopted a Group of Siblings Simultaneously**

*The waiting period* did not exceed three months, “[...] we already had a biological child and we thought it was easier for us, you know how the daily schedule works” (Y2). *The meeting:* “[...] we never imagined that life with three would be chaos” (Y2). Their children arrived at 42 and 18 months old, and as parents, they felt overwhelmed: “[...] when we decided to welcome our two children, we didn't grasp the full extent of what was coming our way” (Y1). “The first year is a situation that overflows the financial, emotional, planning capacity” (Y2); despite preparing for it, reality exceeded their expectations.

*Rejection:* the girl presented unexpected attitudes: “[...] Linda's first reaction was, I don't like the room, I don't like the color, she didn't like anything; it was a shock, especially with her” (Y3). Her denial emerged as a response to her adoption: “[...] what surprised me the most was that she didn't like anything, nothing amazed her” (J2). It was as if she did not feel comfortable in any place or situation. “[...] We had this romanticized idea of love at first sight, that from the

moment we saw each other, we would assume our roles as parents and child, and but her adaptation remains a challenge” (J2). The complexity of the experience oscillated between imagination and the harsh reality they faced.

At first, they came to feel that the situation was getting out of hand: “[...] I had always dreamed of a girl and when my girl arrived, I didn't know what I was going to do with that love I was supposed to have for her” (Y3). They wrestled with contradictions and ambivalence: “[...] I even asked myself, if I would be able to love her as much because, with my son, it was different because he was very young, and one quickly forms an attachment with a baby” (Y2). Finally, reflection, recognition, and affection became the outcome: “[...] the children came into our lives to help us through internal processes” (Y3). Considering this premise allowed them to take responsibility and address their internal challenges to embrace their new reality as an adoptive family.

*Adaptation:* “[...] the first year is very hard, but after that, life flows, and then the challenge is to have passed the first year together. I believe it strengthened us as a couple; we needed a lot of mutual support during that time” (Y2). Understanding and redefining the adoption experience was both an individual and a couple's journey that evolved. “It was complex for us, that period was very exhausting. She often told us I love you, but it did not feel natural” (J2), feeling that the expression of affection was not genuine caused concern, however, they considered it understandable due to the complexity of the situation itself.

*Acceptance:* facing the difficulties of the first year and overcoming them was considered crucial, “[...] that first year is a learning experience” (J2). For them, the bond and attachment between parents and children was generated inexplicably:

Sometimes, I also think, would it be that difficulties make us fall in love and develop affection? I also think it is something magical. That's magic, because those things that used to bother us, we now find amusing. Everything shifts to the other side, now we see things as beautiful, I don't know how it happens, but it happens. (J2, personal communication, October 21, 2021).

Subsequent reflection allowed them to reinterpret their experiences, and humor became a catalyst for parental demands: “[...] we have been so busy with life that we barely talk (laughs), everything has been so intense” (Y2). Time and love are the key elements for a successful adoption process and recognizing that life gradually returns to normal. “I always say, it is difficult, but it is beautiful, it needs time and a lot of love” (Y3), the perception from the outside generates well-being within the home.

In retrospect, valuing the adoption experience brought gratification: “[...] the love we feel now is just as deep and immense, allowing us to see the family as a whole. We are happy with our achievements, everyone sees that we are doing well, so we say, all this was worth it” (Y3). When they reflect on their achievements, they feel rewarded for the effort they have made.

When there is a biological child, questions arise about their role within the family since “[...] he became just one among the others; at one point, he expressed this, but he now knows that we love them all equally and that sometimes one needs more support than the other” (Y3). The parents’ maturity allowed them to foster fairness and reassurance: “[...] our two children bonded with us through love, it’s a process that involves the heart and time” (J2). In the resignification of the adoptive event, parents demarcate affection and coexistence as essential elements in the bonding process.

## Discussion

Mothering and fathering through adoption is possible when the child is symbolically represented in the parents’ desire (Rosser, 2015). When adopted children are wanted, they find their place and are truly recognized as sons or daughters. As one couple stated: “[...] these children are desired a thousand percent, it was not an accident” (A3). Desire is a differentiating element in adoption, which supports the resignification of the child’s and parents’ lives. According to Boetscht et al. (2001), when a child occupies the space of desire, an encounter is created that fosters emotions linked to well-being, as well as new meanings in interactions. In this context, the family begins to rewrite its own story.

Attachment in adopted children acquires a specific characteristic, marked by a significant event: an interruption in the bond with their biological mother due to separation (Pérez, 2015), which shapes what Newton (2010) defines as the “primary wound”. The adoptive family cannot overlook this reality; understanding and accepting in advance that the new bond is complex can provide peace of mind and reassurance to the new parents.

[When] this natural evolution is interrupted because of a postnatal separation from the biological mother, the resulting experience of abandonment and loss is indelibly stamped into the unconscious psyche of these children, causing [...] the primary wound. (Newton, 2010, p. 20).

It is essential to accept that the previous experiences of the adopted children were marked by moments of discontinuity in their ties: with the members of the family of origin, with the transitional caregivers in case of remaining in protective institutions, or with the members of the foster families. In this way, recognizing this trajectory in the child's life before adoption can facilitate the bonding process with the adoptive family. This preparatory phase demands empathy, patience, acceptance, respect, consideration, and hope from new parents, as love in adoption emerges as a sentiment built over time and through daily interactions.

The child arriving through adoption is a stranger, carrying a history of abandonment and trauma that does not end with adoption. If they have suffered mistreatment, they may even come to believe they deserve it. Transforming this defensive and challenging attitude into a relationship based on love and trust is a process that presents significant challenges (Pérez, 2010) and involves moments of suffering.

New parents and siblings are also strangers to him/her. For parents, understanding the child's previous detachment process is complex, and the challenge is to approach it with an empathetic and understanding attitude. The adoptive bonding process is expected to lead to a sense of parenthood. However, each bonding experience is unique; the connection between all involved develops gradually through effort, cognition, learning, and the development of parental skills and competencies.

In this regard, families expressed this in their own words: "[...] that first year we cried, we laughed, we were frustrated" (Y2); "Mercurio has always shown, since arriving, that eternal fear of being alone" (Mar3); "[...] we will never know exactly what she experienced, no matter how much they try to document it for us" (I3); "[...] I say that our daughter is very strong because her life changed overnight" (M3); "[...] she has her father, her mother, and her siblings, among them it was very important to create that bond, because at first, our daughter denied it for three years, while she incorporated in her language that she had an older brother" (Y2); "[...] now she looks at me and says 'Oh no, poor dad sleeping alone!'; In adoption, everything requires management; we cannot be ignorant about it" (A3). These accounts acknowledge the difficulties faced in the months and years following adoption and do not dismiss future challenges. Accepting the ups and downs of the new family reality and the ambivalence in daily relationships can help reduce initial parental stress and foster a gradual emotional bond that must be continuously nurtured throughout life.

The construction of emotional bonds is a two-way process. On one hand, the child needs to understand what it means to have a mother and/or father, learn to recognize them as fundamental figures in their lives and feel loved and valued by them. Essentially, they must experience love to learn to love in the future

(Lapastora, 2021). On the other hand, for parents, it involves accepting that child as their own, feeling and reading their needs, and connecting with them, thereby learning to be parents.

Family life takes its course: “I always say it is difficult, but it is very beautiful, [...] the comment has always been, your children look very good, that they seem very calm and are normal children” (Y3). Thus, the perception from the outside, sometimes, generates in the parents a sense of balance and well-being. Conceiving ourselves as a family and recognizing adoption as an event that will accompany its members throughout their lives as an indelible mark is a great challenge: “[...] the concept that we are five, and six with the dog, I think that is the moment when we understood that we are already the family that recognizes itself” (Y3); “[...] completely fulfilled, that missing piece arrived, what we needed to be a complete family” (A2); “Mercurio is a son of the heart, a loving child” (Ate1); “[...] every adoption process is different, the children are different, the parents are different; families need time to connect, and each person needs their own time for the feeling of love to emerge” (M3). Not judging oneself but instead recognizing that forming a family is a process that unfolds over time is crucial.

During the first years, each family faced dilemmas and challenges before achieving an adoptive family identity. This involved accepting that, although it differs from a biological family, it is equally valid and legitimate (Montano, 2012). The process leads to the construction and consolidation of the bond, aiming for a reparative intention. Additionally, it follows a step-by-step progression that shapes each family's story.

The construction of an adoptive family identity, with the arrival of a new member in the home, presents significant questions and challenges. This was expressed by the consulted individuals: “[...] I think the first year is one of deep reflection on the decision made; you think, wow, are we capable of making this work?” (Y2); “[...] I told my husband, to accept this situation, ‘Don't worry, raise the child and I will be the provider’, because, at that moment of arrival, I felt emotionally overwhelmed” (Ate3). Literature has referenced that children's responses during the bonding process can be difficult and distressing for new parents (Berástegui, 2004). The adaptive process requires parents to adopt flexible, conscious, and reflective attitudes that allow them to accept the complexity of their children's lives before adoption.

Coping requires the implementation of strategies, the use of available family resources, the development of new ones, and the mobilization of personal, familial, and environmental support networks. At times, adoptive families may need to seek therapeutic assistance to navigate complex situations, receive support, and define their path forward.

Thus, it is clear that love at first sight is not a characteristic of adoptive family relationships. Love is neither idyllic nor should it be idealized; it is deconstructed and reconstructed with each step. It does not emerge spontaneously, nor does it flow effortlessly. It is a demanding and challenging loving relationship that requires maturation and consolidation as a family over time.

## Conclusions

Adoption meant a shock, an upheaval, an earthquake, a seismic shift, a whirlwind, a collision, a passionate upheaval, pure change, and a high-voltage situation that overwhelmed financial, emotional, and planning capacities for families.

Rejection was present in all cases, generating moments of crisis for the new parents, characterized by disagreements, discomfort, disappointment, hopelessness, irritability, and frustration. This necessitated the search for coping strategies to overcome these challenges.

When the adoptive couple already has biological children, dilemmas and ambivalence may arise as part of the emotional bonding process with the adopted children. Feelings evolve, and love is built without being forced.

The most significant fears of adoptive families stem from the fear of being judged, of being the only ones experiencing difficulties during the adaptation stage, and from feelings of guilt and shame due to lacking the resources to handle complex situations.

The adaptation stage extended over time and was defined as emotionally intense, tough, challenging, and unimaginable. It required empathy, respect, mutual support, good humor, learning, understanding, acceptance, trust, love, and dedication.

The emotional bond between the members of the adoptive family is the product of a patient and bilateral approach. This process requires affection, validation of children's emotions, acknowledgment of their feelings, adults taking responsibility for uncertainties, and accepting everyone's vulnerabilities to understand and respond to each other's needs.

In the life of an adopted child, previous experiences of detachment shape the development of later attachment processes. Understanding that a child's life does not begin with adoption allows new parents to accept and comprehend their attitudes, behaviors, and emotions connected to the complex experiences each child has endured.

The development of parental desire before adoption must be firmly established before the child's arrival, as it serves as an emotional foundation for families

when facing the realities of relationships with their children. If this desire is strong and enduring, it is more likely that families will have the resources needed to navigate adaptation difficulties. Conversely, if this desire is not sufficiently established, emotional pain arises, and conflicts tend to be greater and more challenging to resolve. However, these challenges can be addressed along the way, as long as parents engage in conscious reflection on these difficulties.

Strengthening the socio-educational and psycho-educational processes of adoptive families, both before and after adoption, is essential. Professional guidance and reflections on the challenges posed by adaptation and cohabitation with adopted children should focus on the construction and nurturing of the emotional bond.

Accepting and recognizing that adoption is not as easy as you might think allows you to empower yourself and feel that it is essential to implement strategies, use the tools you have, develop others, and deploy all the personal and partner resources. Moreover, seeking professional assistance to manage difficult situations and define a personal path is important, as the complexity of the adoption process cannot be fully anticipated.

The main limitation of this study was the tendency of adoptive couples to maintain secrecy regarding their post-adoption experiences, which they perceive as highly impactful due to their intensity, the unexpected reactions, and the difficulties they consider challenging to resolve.

Listening to the narratives of adoptive couples in the local context and translating them through research became an opportunity to understand the particularity of their experiences and bring them out of silence. Participation in the study allowed couples to conceptualize and redefine the adoption experience as both an individual and a shared journey that has been reconfigured over time.

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# Polyconsumption of Legal and Illegal Substances in The Elderly: Comparison Between Medellín and Pereira\*

[English version]

Policonsumo de sustancias legales e ilegales en la persona mayor: comparativo entre Medellín y Pereira

O policonsumo de substâncias legais e ilegais em idosos: uma comparação entre Medellín e Pereira

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## **Abstract**

**Objective:** To compare the poly-consumption of legal and illegal substances among elderly residents in the cities of Medellín and Pereira (Colombia). **Methodology:** Quantitative, cross-sectional study, with analytical scope, which explored the demographic, social and health characteristics associated with poly-drug use, defined as the concurrent use of two or more legal and/or illegal substances. A total of 1005 adults, randomly selected from their neighborhoods and homes, were surveyed through probability sampling in each city. Descriptive statistics and binomial regression analysis were used in the analysis, with measures of association, hypothesis testing and 95% confidence intervals. **Results:** The use of polypharmaceuticals was recorded in 66% of the elderly, with a higher frequency in Pereira ( $p < 0.05$ ). The associated demographic factors were: older than 70 years; in social: high self-esteem and perceived discrimination and health-related: experiencing pain, illness and poor sleep quality. The final model accounted for 20% of the variability observed in the use of polydrugs.

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**Conclusions:** No differences were found by city, but age, illness, and pain appear to be closely related to higher substance use; therefore, social engagement strategies and activities that promote distraction, energy expenditure, inclusion, and self-esteem are needed.

**Keywords:** Polypharmacy; Substance-related disorders; Aging; Health; Social support (obtained from MeSH Thesaurus).

## Resumen

**Objetivo:** comparar el policonsumo de sustancias legales e ilegales entre personas mayores residentes en las ciudades de Medellín y Pereira (Colombia). **Metodología:** estudio cuantitativo, transversal, con alcance analítico. Se exploraron las características demográficas, sociales y de salud asociadas al policonsumo, definido como el uso concurrente de dos o más sustancias legales y/o ilegales. Se encuestó a 1005 adultos, seleccionados al azar de sus barrios y hogares, a través de un muestreo probabilístico en cada ciudad. En el análisis se utilizaron estadísticas descriptivas y análisis de regresión binomial, con medidas de asociación, pruebas de hipótesis e intervalos de confianza del 95%. **Resultados:** el 66% de las personas mayores registraron policonsumo, con mayor frecuencia en Pereira ( $p < 0,05$ ). Los factores demográficos asociados fueron: mayores de 70 años; en social: alta autoestima y discriminación percibida; y relacionados con la salud: experimentar dolor, enfermedad y mala calidad del sueño. El modelo final representó el 20% de la variabilidad observada en el policonsumo. **Conclusiones:** no se encontraron diferencias por ciudad, pero la edad, la enfermedad y el dolor parecen estar estrechamente relacionados con un mayor consumo de sustancias; por lo tanto, se requieren estrategias y actividades de participación social que promuevan la distracción, el gasto de energía, la inclusión y la autoestima.

**Palabras clave:** polifarmacia; trastornos relacionados con sustancias; envejecimiento; salud; apoyo social (obtenido del tesoro DeCS).

## Resumo

**Objetivo:** Comparar o policonsumo de substâncias legais e ilegais entre idosos que vivem nas cidades de Medellín e Pereira (Colômbia). **Metodologia:** Estudo quantitativo, transversal, com escopo analítico, que explorou as características demográficas, sociais e de saúde associadas ao policonsumo de drogas, definido como o uso simultâneo de duas ou mais substâncias legais e/ou ilegais. Foram pesquisados 1005 adultos, selecionados

aleatoriamente em seus bairros e domicílios, por meio de amostragem probabilística em cada cidade. Estatísticas descritivas e análise de regressão binomial foram usadas na análise, com medidas de associação, testes de hipóteses e intervalos de confiança de 95%. **Resultados:** 66% dos idosos relataram uso de múltiplas drogas, com maior frequência em Pereira ( $p < 0,05$ ). Os fatores demográficos associados foram: idade superior a 70 anos; sociais: autoestima elevada e discriminação percebida; e relacionados à saúde: dor, doença e qualidade de sono ruim. O modelo final foi responsável por 20% da variabilidade observada no uso de múltiplas drogas. **Conclusões:** Não foram encontradas diferenças por cidade, mas a idade, a doença e a dor parecem estar intimamente relacionadas ao aumento do uso de substâncias; portanto, são necessárias estratégias de engajamento social e atividades que promovam a distração, o gasto de energia, a inclusão e a autoestima.

**Palavras-chave:** Polifarmácia; Transtornos relacionados a substâncias; Envelhecimento; Saúde; Apoio social (extraído do tesouro MeSH).

## Introduction

The United Nations Office on Drugs and Crime (UNODC) highlights that the post-2019 global pandemic era saw a surge in the misuse of drugs among older adults, including the inappropriate use of analgesics such as opioids and benzodiazepines (De Joncheere & Del Campo, 2021), and the abuse of substances like alcohol, marijuana, and nicotine (Castro JA et al., 20115) (SAMHSA, 2024). According to the European Union Drugs Agency, poly-drug use has been defined as the use of more than one drug or type of drug per person, which may involve the use of multiple substances, either at the same time (concurrent use) or sequentially over a specified time (concurrent use); within this set of drugs are the substance legal and illegal drugs; alcohol, tobacco, psychoactive substances, medicines, some tablets or powders containing more than one substance, are examples of these drugs (European Monitoring Centre for Drugs and Drug Addiction, 2021). For Connor and collaborators (Connor et al., 2014), poly-drug use in general is carried out with the aim of achieving new effects (not achievable with the use of each substance separately), enhancing the desired effects or attenuating the undesired effects of substance use (Connor et al., 2014).

It has been documented that, after the Covid-19 pandemic, there was evidence of an increase in the inappropriate administration of drugs such as analgesics (opioids) and benzodiazepines in the elderly (De Joncheere & Del Campo, 2021) and of substance abuse such as: alcohol, marijuana and nicotine, among others (Substance Abuse and Mental Health Services Administration & Center for Behavioral Health Statistics and Quality, 2020) whose excessive consumption easily leads to poly-drug use.

Older adults have been increasing the frequency of drug use disorders because physiological, emotional, social changes and the appearance of multimorbidity, some of them typical of age, are triggers for this consumption. This population generally metabolizes substances more slowly and their brains may be more sensitive to drugs (National Institute on Drug Abuse - NIDA, 2020). One of the most frequent situations that has been reported and that is related to morbimortality is, in addition to polyconsumption, the polypharmacy, defined as the consumption of three or more drugs a day and simultaneously (Hernández et al., 2018); this, is classified, according to the amount of daily medication intake as minor polyconsumption when there are four or fewer medications (- Sanchez-Rodriguez et al., 2019), major polyconsumption when there are five or more medications or supplements per day (Qato et al., 2008) and excessive polypharmacy when there are more than 10 (Jyrkkä et al., 2009).

Polypharmacy puts the elderly at high risk due to potential drug interactions, adverse reactions, prescription cascade, non-adherence to treatments, inadequate

prescription (Castro et al., 2015) and even accidental use of medications. This, in combination with other types of substances, also generates poly-drug use, which leads to worsening health conditions (National Institute on Drug Abuse - NIDA, 2020). The use, abuse or accidental use of legal and illegal substances has several consequences, such as: suicidal behavior (Schepis et al., 2019) and other mental health problems (Center for Substance Abuse Prevention, Substance Abuse and Mental Health Services Administration, 2019), brain damage (Colliver et al., 2006), cardiopulmonary diseases, alterations in mood, coordination and reaction among others (National Institute on Drug Abuse, 2023). During the recent COVID pandemic, this consumption seems to have increased and with it, the negative consequences on health; those over 65 years of age or older, are at greater risk due to a weakened immune system or other chronic health conditions (National Heart, Lung, and Blood Institute, 2022), making them more susceptible to the development of epidemics and pandemics, such as COVID-19.

Coronaviruses (CoV) constitute a large family of viruses responsible for numerous conditions, including the Middle East Respiratory Syndrome (MERS-CoV) and the Severe Acute Respiratory Syndrome (SARS-CoV-2). COVID-19, or 2019-nCoV, represents a novel strain of coronavirus (PAHO, 2023b). The risk of severe outcomes from this virus, including hospitalization, need for intensive care, mechanical ventilation, or death, escalates with age, particularly beyond the age of 50 (CDC, 2023; Bartleson et al., 2021).

One of the main effects was pulmonary. Among the pulmonary diseases that frequently affect the elderly is pneumonia; an acute respiratory infection that increases with age and is caused by bacteria (*Streptococcus pneumoniae* or *pneumococcus*), viruses (influenza virus, rhinovirus and SARS-CoV-2) and fungi (*Pneumocystis jirovecii*).

In response to the pneumonia outbreak caused by the SARS-CoV-2 virus (the coronavirus responsible for the COVID-19 pandemic), governments declared health emergencies, necessitating enhanced social distancing measures, especially among the elderly. Social isolation, defined as the objective state of limited social relationships or contact, contrasts with loneliness, which is the subjective experience of feeling isolated (National Academies of Sciences, Engineering and Medicine, 2020). This enforced isolation has led to altered patterns in drug consumption among adults, notably an increase in late-onset consumption, where individuals begin or escalate their usage at older ages, increasing their risk of respiratory, liver, degenerative, metabolic disorders, mental health issues, and susceptibility to accidents and falls (De Joncheere & Del Campo, 2021).

Substances, encompassing a range of natural or synthetic compounds, impact the nervous system by altering functions that regulate thoughts, emotions, and behavior. These can be categorized into recreational use (e.g., alcohol and

tobacco), pharmacological use (e.g., tranquilizers and opiate analgesics), and general use (e.g., industrial solvents) (Pan American Health Organization, 2023a). In Colombia, the definition of drugs or psychoactive substances, aligned with the World Health Organization (WHO), describes them as any substance that, once introduced into the body through any route of administration, alters the central nervous system's functioning and has the potential for creating psychological, physical, or combined dependence. These substances are capable of modifying an individual's consciousness, mood, or thought processes and are classified based on legal status, origin, and effects (Minjusticia, 2023):

- By legal status, substances are delineated as illicit or illegal (prohibited by law, such as heroin, cocaine, marijuana, etc.) and licit or legal (not subject to sanctions under Colombian law).
- Origin categorizes substances as natural (existing in the environment without manipulation) and synthetic (manufactured in laboratories).
- Based on effects on the central nervous system, classifications include stimulants (enhancing psychic activity and other organs), depressants or psycholeptics (reducing bodily functions and psychic activity), and hallucinogens (altering senses and states of consciousness).

For this study, the classification was selected based on its legal status (Barreto et al., 2014), given that the consumption of medications and pharmaceutical preparations falls under this category.

The phenomenon of population aging, a result of the epidemiological transition (Cardona et al., 2021), signifies a shift in disease and mortality patterns, characterized by a rise in chronic conditions and medication use (both prescribed and self-medicated). The advent of new symptoms often leads to the consumption of additional medications, contributing to the prevalence of polypharmacy (Gutiérrez-Valencia et al., 2019). It is noted that a third of all prescribed medications are intended for individuals over 65 years of age, with nearly 75% engaging in the use of non-prescribed drugs or medications lacking clinical justification for their conditions (Shorr et al., 2007; Hayes et al., 2007; Casas-Vásquez et al., 2016).

Dependency on pharmaceutical substances is well-documented, with some substances consumed for pain relief or discomfort, while others are used for their psychoactive effects, potentially leading to addiction, diseases, and adverse events (Sim et al., 2004; Ruíz-Jasso et al., 2022). Moreover, alcohol consumption



has been observed to negatively impact basic or instrumental activities of daily living (ABIVD) (Mendoza-Meléndez et al., 2015), and in some cases, high levels of consumption may mitigate the adverse effects of drugs (NIDA, 2023).

The consumption of psychoactive substances has predominantly been explored within the younger demographic. However, the elderly have been significantly impacted by social isolation, loneliness, and the fear of contagion during the COVID-19 pandemic, influencing their mood and potentially leading to the misuse of both legal and illegal substances. Consequently, this study aimed to assess the prevalence of polydrug use among the elderly in Medellín and Pereira, Colombia, and explore its association with personal and social characteristics.

## Methodology

This quantitative, observational study employed a cross-sectional design with an analytical perspective. The target population comprised 1,005 individuals aged 60 and above, residing in the urban areas of Medellín and Pereira. Participants were selected from April to August 2021 using probabilistic techniques, specifically two-stage cluster sampling. Eligibility criteria included urban residency in the mentioned cities, satisfactory cognitive function, and consent to participate voluntarily, evidenced by signing an informed consent form in the presence of two witnesses. Data collection was conducted at participants' residences, adhering to current biosafety standards due to national restrictions on social mobility prompted by the COVID-19 pandemic.

Experts administered surveys to investigate the consumption of nine psychoactive substances: tobacco, alcoholic beverages, cannabis, cocaine, amphetamines, inhalants, tranquilizers, hallucinogens, and opiates, in addition to the use of pharmaceuticals, both prescribed and self-medicated. From these data, a new variable, “polyconsumption,” was defined to denote the use of two or more substances, legal or illegal. Additional variables assessed included personal (demographic, physical health, mental health) and social (family, economic) factors, gauged via self-report. Analysis involved estimating the prevalence of polyconsumption and its correlation with the personal and social variables examined. Initial crude prevalence ratios were calculated, followed by binomial logistic regression to refine the model, including only variables with a statistical significance of  $p < 0.05$  in preliminary analyses. The final model (logistic function) was obtained from the following equation:

$$\text{Probability of polyconsumption} = 1 / (1 + e^{-(\beta_0 + \beta_1 X_1 + \beta_2 X_2 \dots \beta_k X_k)})$$

The coefficients included correspond to the estimates (through the maximum likelihood method) for the variables and their categories of interest that were associated with polyconsumption in the final model ( $p$ -values  $< 0.05$ ). The chi-square test was used to test the overall significance of the model and to estimate the total variance explained by the variables included.

The study received approval from the CES University Institutional Ethics Committee, documented in the minutes of May 23, 2019 (minutes No. 134). The manuscript does not contain associated data nor is it deposited in any repository; you can access it with the authorization of the investigators

## Results

This investigation encompassed 1,005 elderly individuals residing in the urban locales of Medellín and Pereira, Colombia, in 2021. Participants' ages spanned from 60 to 105 years, with a median age of 67 years and an interquartile range of 63 to 73 years. Notably, polydrug use was more prevalent among the younger segment of this cohort (60 to 74 years old). Male participants exhibited a higher incidence of polydrug use, with significant variances observed between the two cities ( $p=0.001$ ). The overall polyconsumption rate of legal and illegal substances within this elderly demographic was 66%; specifically, 54.2% in Medellín and 77.6% in Pereira, indicating substantial statistical disparities between the locations ( $p<0.001$ ).

In Medellín, 61% of single individuals reported multiple substance use, compared to 81.3% in Pereira. The analysis revealed city-based differences in polydrug use concerning various factors, except for sex, age, and suicidal behavior. The distribution of substance users was 40.9% in Medellín and 59.1% in Pereira. Table 1 delineates the percentage distribution of the elderly by polydrug use, alongside personal, social, and health-related attributes, with the  $p$ -value indicating city-specific differences in polydrug use across these characteristics.

Regarding social determinants, 65.1% of participants citing low social support engaged in polydrug use. This figure rose to 76% among those feeling discriminated against and 66% for individuals reporting abuse. Health-wise, polydrug consumption was reported by 85% of those perceiving their health quality as poor, 86% with multimorbidity, 76% with a COVID-19 history, 91% falling ill in the four months preceding the study, 89% experiencing pain, 81% with poor sleep quality, and 68% at risk of suicidal behavior. Except for multimorbidity, COVID-19 history, and sleep quality, Pereira's elderly population showed higher frequencies of these conditions.

Furthermore, higher self-esteem correlated with increased polydrug use, particularly in Medellín. Detailed frequencies are provided in Table 1.

**Table 1.** Percentage distribution of older people by personal, social and health characteristics, according to polyconsumption of legal and illegal substances, by city. Colombia: SABAM Project, 2021.

Individual and social characteristics	City						p value
	All Yes (n=663) (66,0%)	No (n=342) (34,0%)	Medellín Yes (n=271) (54,2%)	No (n=229) (45,8%)	Pereira Yes (n=392) (77,6%)	No (n=113) (22,4%)	
<b>Gender</b>							0,217
Female	347 (64,3)	193 (35,7)	162 (53,8)	139 (42,6)	185 (77,4)	54 (22,6)	
Male	316 (68,0)	149 (32,0)	109 (54,8)	90 (45,2)	207 (77,8)	59 (22,2)	
<b>Age group (years)</b>							0,158
Young (60-74)	521 (64,7)	284 (35,3)	225 (53,1)	199 (46,9)	296 (77,7)	85 (22,3)	
Older (75-89)	134 (71,7)	53 (28,3)	43 (63,2)	25 (36,8)	91 (76,5)	28 (23,5)	
Long live (90-99)	8 (66,7)	4 (33,3)	3 (42,9)	4 (57,1)	5 (100,0)	0 (0,0)	
<b>Marital Status</b>							<0,001
Single	203 (73,6)	73 (26,4)	68 (61,8)	42 (38,2)	135 (81,3)	31 (18,7)	
Married/ common-law	265 (66,9)	131 (33,1)	120 (55,8)	95 (44,2)	145 (80,1)	36 (19,9)	
Separate/ divorced	93 (58,5)	66 (41,5)	33 (41,3)	47 (58,8)	33 (41,3)	47 (58,8)	
Widower	102 (58,6)	72 (41,4)	50 (52,6)	45 (47,4)	60 (75,9)	19 (24,1)	
<b>Perceived social support (MOS Scale)</b>							<0,001
Lower support	125 (65,1)	67 (34,9)	78 (57,49)	58 (46,2)	47 (83,9)	9 (16,1)	
High support	538 (66,2)	275 (33,8)	193 (53,0)	171 (47,0)	345 (76,8)	104 (23,2)	
<b>Discrimination</b>							<0,001
Discrimination	294 (76,2)	92 (23,8)	72 (61,0)	46 (39,0)	222 (82,8)	46 (17,2)	
Not discrimi- nate	369 (59,6)	250 (40,4)	199 (52,1)	183 (47,9)	170 (71,7)	67 (28,3)	
<b>Self-esteem</b>							<0,001
Low-moderate	174 (52,1)	160 (47,9)	38 (25,0)	114 (75,0)	136 (74,7)	46 (25,3)	
High	489 (72,9)	182 (27,1)	233 (67,0)	115 (33,0)	256 (79,3)	67 (20,7)	
<b>Abuse (Geriatric Abuse scale)</b>							<0,001
Any abuse	447 (66,4)	226 (33,6)	223 (58,3)	167 (41,8)	214 (78,4)	59 (21,6)	
Not abuse	216 (65,1)	116 (34,9)	38 (38,0)	62 (62,0)	178 (76,7)	54 (23,3)	
<b>Perceived Health</b>							<0,001

Individual and social characteristics	City						p value
	All		Medellín		Pereira		
	Yes (n=663) (66,0%)	No (n=342) (34,0%)	Yes (n=271) (54,2%)	No (n=229) (45,8%)	Yes (n=392) (77,6%)	No (n=113) (22,4%)	
Bad	23 (85,2)	4 (14,8)	4 (66,7)	2 (33,3)	19 (90,5)	2 (9,5)	
Regular	306 (74,5)	105 (25,5)	78 (53,4)	68 (46,6)	228 (86,0)	37 (14,0)	
Good	218 (58,9)	152 (41,1)	145 (56,0)	114 (44,0)	73 (65,8)	38 (34,2)	
Very good	66 (55,5)	53 (44,5)	25 (45,5)	30 (54,5)	41 (64,1)	23 (35,9)	
Excellent	50 (64,1)	28 (35,9)	19 (55,9)	15 (44,1)	31 (70,5)	13 (29,5)	
<b>Multimorbidity</b>							<0,001
Yes	205 (86,9)	31 (13,1)	38 (88,4)	5 (11,6)	167 (86,5)	26 (13,5)	
No	458 (59,6)	311 (40,4)	233 (51,0)	224 (49,0)	225 (72,1)	87 (27,9)	
<b>COVID-19</b>							<0,001
Yes	19 (76,0)	6 (24%)	12 (80,0)	3 (20,0)	7 (70,0)	3 (30,0)	
No	644 (65,7)	336 (34,3)	259 (53,4)	226 (46,6)	385 (77,8)	110 (22,0)	
<b>Any Disease (last 4 months)</b>							<0,001
Yes	194 (91,1)	19 (8,9)	70 (87,5)	19 (12,5)	124 (93,2)	9 (6,8)	
No	469 (59,2)	323 (40,8)	201 (47,9)	219 (52,1)	268 (72,0)	104 (28,0)	
<b>Pain (last 6 months)</b>							<0,001
Yes	156 (89,7)	18 (10,3)	67 (84,8)	12 (15,2)	89 (97,3)	6 (6,3)	
No	507 (61,0)	324 (39,0)	204 (48,5)	217 (51,5)	303 (73,9)	107 (26,1)	
<b>Sleep quality</b>							<0,001
Bad	170 (81,3)	39 (18,7)	74 (85,1)	13 (14,9)	96 (78,7)	26 (21,3)	
Good	493 (61,9)	303 (38,1)	197 (47,7)	216 (52,3)	296 (77,3)	87 (22,7)	
<b>Self-Injurious Behavior</b>							0,059
Some risk	413 (68,3)	192 (31,7)	150 (55,6)	120 (44,4)	263 (78,5)	72 (21,5)	
Low risk	250 (62,5)	150 (37,5)	121 (52,6)	109 (47,4)	129 (75,9)	41 (24,1)	

Table 2 outlines the percentage distribution of elderly individuals based on their polyconsumption of legal and illegal substances. Among the substances, tobacco and alcoholic beverages emerged as the most frequently consumed. Notably, the consumption of alcoholic beverages showcased significant inter-city differences, with a higher prevalence in Medellín (16.2%). The combined use of alcoholic beverages and tobacco was most commonly reported by older adults, with percentages ranging between 13.7% and 15.1%. Additionally, cannabis and tranquilizers, including sleeping pills, were used by six older individuals, while cocaine, amphetamines, inhalants, hallucinogens, and opiates were each reported by five individuals.

**Table 2.** Percentage distribution of older people according to polyconsumption of legal and illegal substances, by city. Colombia: SABAM Project, 2021.

Legal and illegal substances	City						P value
	All		Medellín		Pereira		
	n=1005		n = 500		n = 505		
	n	%	n	%	n	%	
<b>Tobacco (cigarettes)</b>							
Yes	152	15,1	83	16,6	69	13,7	0,194
No	853	84,9	417	83,4	436	86,3	
<b>Alcoholic beverages</b>							
Yes	138	13,7	81	16,2	57	11,3	0,024
No	867	86,3	419	83,8	448	88,7	
<b>Cannabis</b>							
Yes	6	0,6	1	0,2	5	1,0	0,104
No	999	99,4	499	99,8	500	99,0	
<b>Cocaine</b>							
Yes	5	0,5	1	0,2	4	0,8	0,182
No	1000	99,5	499	99,8	501	99,2	
<b>Amphetamines /other type of stimulants</b>							
Yes	5	0,5	1	0,2	4	0,8	0,182
No	1000	99,5	499	99,8	501	99,2	
<b>Inhalants</b>							
Yes	5	0,5	1	0,2	4	0,8	0,182
No	1000	99,5	499	99,8	501	99,2	
<b>Tranquilizing Agents (Sleeping pills)</b>							
Yes	6	0,6	3	0,6	3	0,6	0,990
No	999	99,4	497	99,4	502	99,4	
<b>Hallucinogens</b>							
Yes	5	0,5	1	0,2	4	0,8	0,182
No	1000	99,5	499	99,8	501	99,2	
<b>Opioid</b>							
Yes	5	0,5	1	0,2	4	0,8	0,182
No	1000	99,5	499	99,8	501	99,2	

Table 3 delves into the demographic, social, and health-related conditions associated with polydrug use among the elderly, dissected by the total study population and segmented by city. Across the board, demographic, social, and health factors play a pivotal role. Age, particularly being 70 years or older, increases the likelihood of polydrug use by 14%. Socially, experiencing discrimination amplifies this probability by 28%, whereas possessing low self-esteem diminishes it by 29%. Health-wise, recent illness, enduring pain, and poor sleep quality escalate the probability of polydrug use by 54%, 47%, and 31%, respectively.

In Medellín, the factors linked to polydrug use encompass age (PR=1.28), experiencing mistreatment (PR=1.53), and several health conditions: a history of Covid (PR=1.50), illness within the last four months (PR=1.83), presence of pain (PR=1.75), and poor sleep quality (PR=1.78). Conversely, in Pereira, perceived discrimination (PR=1.15) and health issues related to illness and pain (PR=1.29 and PR=1.27, respectively) are significant factors.

**Table 3.** Demographic, social and health conditions of older people associated with polyconsumption of legal and illegal substances. Colombia: SABAM Project, 2021.

Characteristics	City								
	All			Medellín			Pereira		
	PR	IC95%	P value	PR	IC 95%	P value	PR	IC 95%	P value
<b>Gender</b>									
Female	1,00	Reference			Reference		1,00	Reference	
Male	1,06	0,96 - 1,16	0,217	1,02	0,86 - 1,20	0,834	1,01	0,91 - 1,10	0,911
<b>Age group (years)</b>									
Young (< 70)	1,00	Reference			Reference		1,00	Reference	
Older (≥ 70)	1,14	1,05 - 1,25	0,003	1,28	1,10 - 1,50	0,003	1,00	0,91 - 1,10	0,961
<b>Marital Status</b>									
Married	1,00	Reference			Reference		1,00	Reference	
Single	1,02	0,93 - 1,12	0,609	0,94	0,80 - 1,12	0,529	0,95	0,86 - 1,05	0,316
<b>Social support</b>									
<b>Perceived social support (MOS Scale)</b>									
Good support	1,00	Reference			Reference		1,00	Reference	
Low Support	0,98	0,87 - 1,10	0,770	1,08	0,90 - 1,29	0,387	1,09	0,96 - 1,24	0,230

Characteristics	City								
	All			Medellín			Pereira		
	PR	IC95%	P value	PR	IC 95%	P value	PR	IC 95%	P value
<b>Discrimination</b>									
Not discrimination	1,00	Reference			Reference		1,00	Reference	
Discrimination	1,28	1,17 - 1,39	<0,001	1,17	0,98 - 1,39	0,089	1,15	1,05 - 1,27	0,003
<b>Abuse</b>									
-Not abuse	1,00	Reference			Reference		1,00	Reference	
Any abuse	1,02	0,92 - 1,12	0,66	1,53	1,18 - 2,00	<0,001	1,02	0,93 - 1,12	0,655
<b>Self-esteem</b>									
Low-moderate	1,00	Reference			Reference		1,00	Reference	
High	0,71	0,63 - 0,80	<0,001	0,37	0,28 - 0,49	<0,001	0,94	0,85 - 1,04	0,241
<b>Covid-19</b>									
No	1,00	Reference			Reference		1,00	Reference	
Yes	1,16	0,92 - 1,45	0,284	1,50	1,15 - 1,96	0,042	0,90	0,59 - 1,35	0,559
<b>Disease (last 4 months)</b>									
No	1,00	Reference			Reference		1,00	Reference	
Yes	1,54	1,43 - 1,65	<0,001	1,83	1,61 - 2,08	<0,001	1,29	1,20 - 1,40	<0,001
<b>Pain</b>									
No	1,00	Reference			Reference		1,00	Reference	
Yes	1,47	1,36 - 1,58	<0,001	1,75	1,53 - 2,00	<0,001	1,27	1,17 - 1,37	<0,001
<b>Self-Injurious Behavior</b>									
Not risk	1,00	Reference			Reference		1,00	Reference	
Some risk	1,09	0,99 - 1,20	0,059	1,06	0,89 - 1,24	0,510	1,03	0,93 - 1,15	0,504
<b>Sleep quality</b>									
Good	1,00	Reference			Reference		1,00	Reference	
Bad	1,31	1,21 - 1,43	<0,001	1,78	1,56 - 2,04	<0,001	1,02	0,91 - 1,13	0,746

PR: Prevalence Ratio; CI 95%: Confidence Interval

The refined model, adjusted for significant variables identified in bivariate analyses, indicates an enhanced predictive capacity for the entire population. Specifically, low or moderate self-esteem, in contrast to high self-esteem, significantly reduces the odds of polyconsumption by 52%. The final model was estimated from the equation for binary logistic regression with the logit function:  
 $\text{Logit}(\text{polyconsumption}) =$

1

$1 + e^{(\beta_0 + 0.314 \cdot \text{Edad} + 0.410 \cdot \text{Discrimination} + 1.096 \cdot \text{Pain} - 0.733 \cdot \text{Self-esteem} + 1.388 \cdot \text{Illness} + 0.499 \cdot \text{SleepQuality})}$

This model accounts for 20% of the variability in polydrug use among the elderly in both cities. Detailed associations of these factors with polydrug use among older adults in these Colombian cities are meticulously documented in Table 4.

**Table 4.** Final model of factors associated with polyconsumption of legal and illegal substances in older adults from two cities in Colombia: SABAM Project, 2021.

Characteristics	p value	PRa	CI 95%	
			Lower Limit	Upper Limit
Age				
≥70 vs < 70 years	0,035	1,37	1,02	1,84
Discrimination				
Yes vs No	0,008	1,51	1,11	2,07
Pain				
Yes vs No	<0,001	2,99	1,75	5,12
Self-esteem				
Moderate-Low vs High	<0,001	0,48	0,35	0,64
Disease (last 4 months)				
Yes – No	<0,001	3,99	2,38	6,70
Sleep Quality				
Bad quality vs Good quality	0,016	1,65	1,09	2,49

PRa: Prevalence Ration adjusted. CI: Confidence Interval



## Discussion

This investigation revealed that the prevalence of polydrug use, defined as the concurrent consumption of legal and illegal substances, among adults aged 60 and above in two Colombian cities, varies significantly, ranging from 54.2% in Medellín to 77.6% in Pereira. The study identified several factors associated with an increased likelihood of polydrug use, encompassing demographic elements (age over 70), social aspects (perception of discrimination), and health-related issues (experiencing pain, poor sleep quality, and illness).

Considering the time of the pandemic when these data were collected and the consequences (loneliness, increased depression) that isolation by COVID generated, mainly among this population, the construct of polydrug use was based on self-reported consumption of legal (medications, tobacco, alcohol) and illegal substances (psychoactive substances) by the elderly. However, the literature predominantly focuses on medication use and polypharmacy, aimed at managing chronic conditions prevalent in this demographic (Castro-Rodríguez et al., 2015; Hayes et al., 2007; NIDA, 2023; SAMHSA, 2019;), often associated with pain and sleep disturbances, as observed in our findings. Alcohol emerged as the most commonly consumed substance (Keyes, 2023; Sim et al., 2004; Wolde, 2023), with recent studies also exploring the use of cannabis, primarily for its therapeutic benefits rather than recreational purposes (Barreto et al., 2014; Pinelo, 2022). Yet, recreational use of psychoactive substances has been largely understudied in older populations, with existing research primarily targeting adolescents and young adults, excluding those aged 65 and older.

This study's insights are crucial for policymakers and healthcare professionals serving this age group, documenting several interrelated factors that exacerbate the risks associated with polydrug use. The consumption of one substance can lead to the consumption of others, generating interactions between drugs or substances that aggravate the health condition by blocking the effect or generating other undesirable effects (Fateme et al., 2021). Understanding the full clinical history of these individuals is essential to mitigate adverse effects and manage their care more effectively. Notably, older adults exhibit particular vulnerabilities to substances like alcohol due to physiological aging, increased chronic disease burden, and medication use (GBD, 2015; Han et al., 2017). Moreover, the intersection of substance abuse with mental and behavioral disorders in the elderly is well-documented, presenting treatment challenges and often stemming from underlying chronic conditions.

A cross-sectional examination of the clinical profiles of drug users admitted to intensive care units highlighted a 31.2% prevalence of psychiatric comorbidities, with depression, anxiety, and bipolar affective disorder being predominant (Pereira

et al., 2020). Psychological and psychiatric literature suggests that the abusive consumption of alcohol and drugs can exacerbate or result from mental health issues (Afonso et al., 2022). Although our study did not find direct associations with depressive symptoms, such conditions can disrupt sleep patterns, primarily causing insomnia, which may prompt increased use of substances to facilitate sleep (Jiang et al., 2022).

Documented evidence suggests that in the later stages of life, drug use often correlates with the prescription of analgesics, predominantly benzodiazepines—frequently in excessive quantities—and polypharmacy, defined as the concurrent use of five or more medications daily, which poses a risk of addiction (De Joncheere & Del Campo, 2021). Such prescription practices increase the likelihood of drug interactions significantly; a regimen comprising five medications carries a 50% chance of a clinically significant interaction, escalating to a certainty of interaction when the number reaches seven, with 20% of these cases potentially resulting in severe adverse reactions (Homero, 2012).

Given the physiological and functional alterations inherent to aging, older individuals are notably more susceptible to developing respiratory, liver, degenerative, and chronic diseases, including mental health disorders, falls, and traffic accidents. These conditions are exacerbated by the adverse effects of medication and drug consumption (De Joncheere & Del Campo, 2021). A population-based study in Brazil highlighted the rate of hospitalization due to substance use among the elderly (aged 50 and above) across both genders, standing at 16.53 ( $17.01 \pm 16.06$ ) per hundred thousand individuals for those aged 60 to 69 years (Afonso et al., 2022). Furthermore, the Department of Information Technology of the Unified Health System (DATASUS) in Brazil estimated that 17% of individuals aged 50 or older are afflicted with addiction to either legal or illegal substances.

The interplay between the consumption of alcohol and psychoactive substances with various diseases, psychiatric disorders, and cardiovascular and sexual dysfunctions has been established (Afonso et al., 2022). Consequently, these health issues contribute to a cascade of socio-economic challenges, including economic strain, unemployment, homelessness, social isolation, and loneliness. These factors not only result from substance use but also act as catalysts for increased consumption, irrespective of the substance's legality.

The demographic expansion of older populations globally poses significant challenges for achieving active aging processes. Within this context, polydrug use emerges as a critical public health issue, hindering these objectives. Predictions as early as 2008 anticipated a doubling in the number of older individuals with substance use disorders—from an annual average of 2.8 million during 2002-2006 to 5.7 million by 2020 (38). The National Survey on Drug Use and Health (NSDUH) (Han et al., 2010) further revealed that illicit drug use among those

aged 50 to 59 climbed from 5.1% in 2002 to 9.4% in 2007, noting that 90% of this cohort initiated substance use before turning 30. Although our study did not examine the onset age for substance use, it is noteworthy that in the United States, the demand for substance abuse treatment among individuals aged 50 and older was projected to increase from 1.7 million in 2000 to 4.4 million in 2020 (Gfroerer et al., 2003).

Alcohol stands as the predominant psychoactive substance consumed by the elderly (Han et al., 2017; Han et al., 2018), also being the most common among those seeking treatment for substance abuse (Han et al., 2017). Alcohol use is linked to functional decline and elevated mortality risk (Jyrkkä et al., 2009; GBD, 2015), with 3% of global mortality attributable to its consumption. In our study, alcohol and tobacco usage rates were 13.7% and 15.1%, respectively, with the latter representing the highest level of reported use. Notably, both substances saw higher consumption rates in Medellín, though only the differences in alcohol consumption reached statistical significance.

Globally, and particularly within the U.S., there has been a marked increase in excessive alcohol use and alcohol disorders among older adults (De Joncheere, 2021). This uptrend is more pronounced among women, individuals who consume other substances like cannabis, and those in relatively good health during adulthood, i.e., without multimorbidities. Over the past two decades, a significant increase in alcohol consumption, excessive drinking, and reported alcohol use disorders among the elderly has been documented (Keyes, 2023). Among individuals aged 60 or older, alcohol consumption patterns vary, with 7% drinking daily, 8% up to four times a week, 10% up to three times a month, 8% up to once a month, and 68% either never drinking or doing so less than once a year (Afonso et al., 2022).

The National Survey on Drug Use and Health (NSDUH) reported a 19.2% relative increase in excessive alcohol consumption from 2005 to 2014, with a significant linear trend ( $p < 0.001$ ) observed from the period 2005/2006 to 2013/2014. Factors such as being Hispanic, male, and concurrent tobacco or illicit drug use were linked to heavy alcohol consumption. Binge drinkers were also found to have higher instances of tobacco and illegal drug use. Among older adults with multimorbidity, factors including higher income (adjusted OR=1.44,  $p < 0.05$ ), tobacco use in the last month (adjusted OR=2.55,  $p < 0.001$ ), and a substance use disorder due to illegal drugs (adjusted OR=1.80,  $p < 0.05$ ) were associated with an increased likelihood of excessive alcohol consumption (Han et al., 2018; Lindgren et al., 2017; Marengoni et al., 2011). The complexity of managing patients with addictions, particularly regarding polypharmacy, is further complicated by behaviors such as alcohol misuse, illicit drug use, and prioritizing spending on non-health related activities over medication (Homero, 2012).

In examining psychoactive substance use, the NSDUH evaluated the link between marijuana use, dependence, and the non-medical use of prescription opioids among 75,949 adults over 50 years of age from 2002 to 2014. Approximately 3.8% of older adults reported past-year marijuana use, which was notably higher (25%-37%) among individuals dependent on non-medical opioids compared to those without such dependence (3.5%-3.7%). Past-year marijuana use significantly increased the odds of reporting opioid dependence (AOR 9.6, 95% CI=5.8-15.7) and non-medical opioid use (AOR 6.4, 95% CI=5.2-7.8), with heroin identified as the most commonly used non-medical opioid (Ramadan et al., 2021).

Our study reveals that older individuals with low or moderate self-esteem are 52% less likely to engage in polydrug use compared to those with high self-esteem, a finding that diverges from existing empirical evidence. This discrepancy suggests that substance use may provide temporary feelings of well-being or perceived improvements in self-esteem. Significant correlations have been observed between social functioning, duration of substance use, and self-esteem, indicating lower levels of self-esteem and social functioning among those with substance abuse (Ersöğütçü & Karakaş, 2016). Conversely, a study in Spain involving 515 older adults found that 43.3% had low self-esteem, with physical activity positively impacting drug consumption reduction, self-esteem enhancement, and decreased dependency risk (Moral-García et al., 2020). While our research did not directly link polydrug use with physical inactivity, it supports the notion that physical activity correlates with better health outcomes and self-perception, potentially mitigating substance use. A study in China highlighted that self-esteem and emotional well-being could mediate the relationship between perceived social support and loneliness among individuals with substance abuse disorders (Xia & Yang, 2019).

Our study identified a notable correlation between reported discrimination and an increased probability of polydrug use by 51%. The majority of research linking discrimination to substance use primarily focuses on racial discrimination. For instance, the most recent National Survey of American Life, which surveyed African American and Afro-Caribbean adults (with a younger average population age of  $41.5 \pm 0.5$  years), found that perceived discrimination was linked to a higher likelihood of using multiple psychoactive substances, especially illegal ones. Specifically, individuals were 2.35 and 3.10 times more likely to use cocaine and other illegal drugs, respectively, and reported a 38% increased probability of elevated alcohol consumption (Mattingly et al., 2020).

The significance of family and familial support in the aging process is well-established, with strong family bonds (emphasizing quality over quantity) being crucial for enhancing the social well-being of older adults. Stressful situations, including family dysfunction, are suspected to contribute to the deterioration

and cognitive and behavioral changes in this demographic (Gallardo-Peralta et al., 2022; Silva et al., 2023). Although our study did not find a direct association between low social support and polydrug use, among those reporting a lack of support, the frequency of polydrug use was over 60%. A study of 2,098 IAAM-DF users in Mexico revealed that 81.4% perceived low social support, and 82.2% described their family environment as dysfunctional. Tobacco use was linked to perceptions of health and family support, while the use of any substance (illegal or prescribed) was associated with the onset of chronic-degenerative diseases and mental disorders, highlighting the influence of alcohol, tobacco, and other drugs on the health and well-being of older adults in Mexico City (Riquelme et al., 2005).

A narrative review, albeit focused on the general population, investigated the consumption of legal and illegal psychoactive substances, identifying family dynamics such as a negative family atmosphere, conflicts, poor communication, and substance use within the family as factors that elevate the risk of substance use. Conversely, members of highly cohesive families are less likely to engage in substance use behaviors (Barreto et al., 2014). Although the bulk of evidence pertains to adolescents, it has been recognized for over two decades that polydrug use can stem from disruptive family environments (Collins et al., 1998).

The Covid-19 pandemic has exacerbated feelings of loneliness, isolation, and sadness among older adults, subsequently identified as risk factors for increased substance use. A study conducted in Mexico with 380 older participants (50.26% women, average age  $66.79 \pm 5.81$  years) revealed that 31.05% had consumed alcohol, 22.63% tobacco, 16.05% non-prescription tranquilizers, and 7.89% marijuana in the month preceding the survey, with a 2.6% consumption rate for other illegal drugs. Notably, consumption rates were slightly higher among women and single individuals. The study also found associations between symptoms of mild to severe depression and all surveyed drugs, excluding tobacco and opiates, underscoring the necessity of addressing drug use and associated mood disorders among the elderly (Pinelo et al., 2022).

The efficacy of treatment for older adults significantly depends on the strength of their social support networks. Despite substantial efforts in diagnosing and treating the elderly, failures often occur in recognizing patients' financial capacities, understanding treatment indications, and overcoming challenges like geographic isolation or the absence of close support in case of complications, all of which critically affect interventions targeting this demographic (Homero, 2012).

Sleep quality is pivotal for maintaining optimal physical and mental health and ensuring the functionality of daily activities, especially for older adults (Sella et al., 2022). Poor sleep quality was found to increase the likelihood of polydrug

use by 65% in our study. Research from the University of Florida indicated that 29% of seniors utilize cannabis for sleep disorders (Kaufmann et al., 2023), while a study in Ethiopia associated lifetime alcohol, nicotine, inhalants (23), and cannabis use with poor sleep quality and even suicidal ideation (Hayes et al., 2007).

Healthcare professionals have identified poor sleep health as a consistent factor in the initiation and exacerbation of substance use disorders, treatment discontinuation, and relapse. Improving sleep health emerges as a modifiable factor with the potential to diminish the occurrence and severity of these disorders (Spadola et al., 2023).

Continued substance use can lead to dependency, disability, and chronic health issues, with the adverse outcomes of drug dependency—such as illnesses, disabilities, and deaths—being disproportionately prevalent in low- and middle-income countries. Limited access to healthcare in these regions further exacerbates the risk of losing functional independence, a crucial component of elderly well-being, quality of life, and active aging (Marcoa-Pardo et al., 2023).

**Limitations of the study.** One limitation is the presumption that substance use initiation occurs exclusively during aging, potentially directing interventions towards a later life stage, despite evidence indicating early onset. Significant correlations have been observed between self-esteem and the age of substance use initiation ( $p=0.001$ ) (Ersöğütçü & Karakaş, 2016). However, due to the cross-sectional nature of this study, we focused on the current prevalence of polydrug use among older adults, irrespective of onset age, a factor recommended for exploration in future research.

The societal acceptance of substance use among older adults poses another limitation. Many may hesitate to report their consumption due to potential stigma from families, communities, and healthcare providers, particularly those with chronic comorbidities impacting their health and quality of life. Thus, the reliance on self-reported data could lead to underestimations, although this method aligns with similar studies, few of which include hospital records.

## Conclusions

The short- and long-term harms associated with psychoactive substance use are influenced by various factors, including substance type, consumption method, individual characteristics, and the social context of use. This study contributes to understanding a relatively underexplored phenomenon within both the national and regional contexts and among an increasingly relevant age group. Future longitudinal research is essential for a deeper comprehension and to address the

variance observed in our final model. Some characteristics shown by evidence such as age of onset, pandemic context, overuse or misuse of medications, drug interaction effects, the type of substances combined and in general, the practices of older adults (and perhaps in their closest support network) around the subject, could be considered in future lines of research mainly if it is considered that behaviors can be a source of intervention strategies to reverse the impact of “bad practices” on the health and quality of life of the elderly (Heshmatifar et al., 2021). Nevertheless, this investigation identifies modifiable factors potentially reducing substance consumption among the elderly in the studied cities. Factors such as age, illness, and pain appear to be closely linked with increased consumption of legal and illegal substances. Older adults seeking improved quality of life may be more open to substances that alleviate pain and enhance sleep quality. Yet, this approach may not yield lasting benefits and could detrimentally impact long-term health. Recommended strategies include enhancing social networks and activities that foster distraction, energy expenditure, inclusion, and self-esteem. Simple social participation strategies may have a combined effect on the social and health factors associated with polydrug use identified in this study.

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# Validity and Reliability Evidence of a Water-saving Instrument in the Colombian Population\*

[English version]

Evidencia de validez y fiabilidad de un instrumento de ahorro de agua en población colombiana

Evidência de validade e confiabilidade de um instrumento de economia de água na população colombiana

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## Abstract

**Objective:** To present evidence of the validity and reliability of the Water-Saving Questionnaire in the Colombian population. **Methodology:** A cross-sectional study with a psychometric approach was conducted, surveying 1,500 participants. The Water Savings Report Questionnaire was administered, and an exploratory factor analysis was conducted. Internal consistency was assessed using McDonald's  $\omega$  and Cronbach's  $\alpha$ . **Results:** The full scale accounted for 41.55% of the explained variance, with items clustering into two distinct categories. The internal consistency analysis yielded a McDonald's  $\omega$  of .849 (95% CI = .838-.860) and a Cronbach's  $\alpha$  of .843 (95% CI = .831-.854). **Discussion:** The findings indicate that the "Water Savings Report Questionnaire" meets the criteria for adequate psychometric quality. However, further studies are recommended to explore the influence of social and health factors on the results. **Conclusions:** The "Water Savings Report Questionnaire" demonstrated reliability and validity indicators that enable the identification of behaviors related to the environmental management of water use and conservation.

**Keywords:** water saving; validity; reliability; psychometrics; pro-environmental behavior (obtained from UNESCO thesaurus).

## Resumen

**Objetivo:** presentar evidencia de validez y fiabilidad del cuestionario de ahorro de agua en población colombiana. **Metodología:** se realizó una investigación de tipo transversal, con un estudio psicométrico en el que se encuestaron 1500 participantes. Se aplicó el Cuestionario reporte de ahorro de agua, se realizó un análisis factorial exploratorio y un análisis de consistencia interna con  $\omega$  de McDonald y  $\alpha$  de Cronbach. **Resultados:** se evidencia que la prueba completa explica el 41.55% de la varianza, y los ítems se agrupan en dos categorías; el análisis de consistencia interna refiere un  $\omega$  de McDonald de .849 (I.C. 95% = .838-.860) y un  $\alpha$  de Cronbach de .843 (I.C. 95% = .831-.854). **Discusión:** se declara que la versión del «Cuestionario reporte de ahorro de agua» cuenta con los criterios de calidad psicométrica suficiente, y se sugiere llevar a cabo nuevos estudios teniendo en cuenta factores sociales y sanitarios que puedan tener alguna incidencia en los resultados. **Conclusiones:** en el «Cuestionario Reporte de ahorro de agua» se presentaron indicadores de confiabilidad y validez que permiten la identificación de conductas asociadas a la gestión ambiental de uso y cuidado del agua.

**Palabras clave:** ahorro de agua; validez; fiabilidad; psicometría; conducta proambiental (obtenido del tesoro de la UNESCO).

## Resumo

**Objetivo:** apresentar evidências de validade e confiabilidade do questionário de economia de água na população colombiana. **Metodologia:** foi realizada uma pesquisa transversal, com um estudo psicométrico no qual foram pesquisados 1.500 participantes. Foi aplicado o Questionário de Relatório de Economia de Água, foi realizada uma análise fatorial exploratória e uma análise de consistência interna com o  $\omega$  de McDonald e o  $\alpha$  de Cronbach. **Resultados:** é evidente que o teste completo explica 41,55% da variação, e os itens são agrupados em duas categorias; a análise de consistência interna relata um  $\omega$  de McDonald de 0,849 (95% C.I. = 0,838- 0,860) e um  $\alpha$  de Cronbach de 0,843 (95% C.I. = 0,831- 0,854). **Discussão:** afirma-se que a versão do “Water Saving Report Questionnaire” atende aos critérios de qualidade psicométrica suficiente, e sugere-se a realização de mais estudos levando em conta fatores sociais e de saúde que possam ter impacto sobre os resultados. **Conclusões:** o “Water Saving Report Questionnaire” apresentou indicadores de confiabilidade e validade que permitem a identificação de comportamentos associados à gestão ambiental do uso e do cuidado com a água.

**Palavras-chaves:** economia de água; validade; confiabilidade; psicometria; comportamento pró-ambiental (obtido do tesouro da UNESCO).

## Introduction

Global greenhouse gas emissions have increased by approximately 70% since 1970 (Córdova et al., 2018). This has resulted in a global temperature increase of approximately 1.15 degrees Celsius since the pre-industrial era. Consequently, the last eight years have been the hottest on record (Intergovernmental Panel on Climate Change [IPCC], 2022). These emissions are primarily caused by the burning of fossil fuels for power generation, transportation, and industry, as well as by deforestation and land use changes (World Meteorological Organization [WMO], 2023b).

According to the Intergovernmental Panel on Climate Change (IPCC), human activity is highly likely to be the primary driver of the global warming observed in recent decades (IPCC, 2019; 2022). Climate change leads to an increase in the frequency and intensity of extreme weather events, such as storms, heatwaves, floods, droughts, air pollution, mass reduction of glaciers, acidification, and the rising of sea levels (Lavergne et al., 2019). These events can cause irreversible damage to ecosystems and situations that will significantly compromise human life, such as forced displacement of communities, food insecurity, and others (WMO, 2023a).

Water sources have been particularly affected by this phenomenon. Consequences include: a) a decrease in water availability, driven by rising temperatures and reduced rainfall, which impact the availability of drinking water, hydroelectric power generation, and agricultural production; b) changes in water quality, caused by the proliferation of bacteria in bodies of water, posing a greater risk to consumer health; c) impacts on aquatic ecosystems, such as coral reefs and mangroves, which negatively affect biodiversity and economic activities like fishing; d) increasingly recurrent extreme weather events (Dupar, 2019; WMO, 2022).

According to the World Bank (2015), approximately two billion people worldwide lack access to safe drinking water, 3.6 billion do not have basic sanitation services (sanitary units), and 2.3 billion lack at least one basic handwashing facility. This situation explains the gaps in access to drinking water supplies and basic sanitation, which are exacerbated by factors such as rapid population growth, intensive water usage in agriculture and industry, and rainfall variability; a consequence of climate change.

Water pollution is another global issue that impacts the quality and safety of water resources, as well as human health, aquatic biodiversity, and associated ecosystems. According to the World Health Organization (2023), approximately one million people lose their lives each year due to diarrheal diseases contracted from unsafe water or poor hand hygiene. The Ecological Threat Register (2020)

reported that Southeast Asia, the Middle East, and North Africa are the regions most vulnerable to water scarcity. In Latin America, Chile and Mexico are the countries at the highest risk of water stress.

In addition to the above, these regions, in addition to having vast desert territories, also face high water demand from domestic consumption, the impact of industrialization, and the water requirements for agricultural activities. This report also highlights that Greece and Spain yearly consume between 40% and 80% of the total annual water resources available to them.

The National Water Study conducted by the Institute of Hydrology, Meteorology, and Environmental Studies (IDEAM) is a research and monitoring initiative aimed at assessing water availability, quality, and usage, as well as the impact of climate change on water resources and the generation of early warnings in Colombia (IDEAM, 2023). A section is dedicated to the country's contribution to the goals and indicators of Sustainable Development Goal (SDG) 6: "Clean Water and Sanitation."

The progress made in monitoring the indicators associated with the targets of SDG 6 by the IDEAM includes the following indicators: "6.3.2 Proportion of good quality bodies of water," "6.4.1 Change in the efficient use of water resources over time," "6.4.2 Level of water stress: extraction of freshwater in proportion to available freshwater resources," and "6.5.2 Proportion of the surface of transboundary basins subject to operational arrangements for water cooperation." Each of them can be detailed in depth in the aforementioned National Water Study (IDEAM, 2023).

One of the most relevant allies in achieving these objectives is education, which, in addition to being an engine of economic development (Haddad et al., 1990), serves as a fundamental strategy to raise awareness regarding climate change (largely driven by global warming) and help populations adapt to scenarios of environmental degradation (UNESCO, 2014). This is achieved through the increase of knowledge of habitats and their threats, promoting environmental values and convictions that encourage changes in behaviors and lifestyles contributing to the planet's deterioration (Severiche et al., 2016; Villadiego et al., 2015), while also fostering social and sustainable development (Saza-Quintero et al., 2023).

This approach requires reflection on the essential role of human behavior in environmental impact (Gifford & Nilsson, 2014; Mendoza, 2021; Oskamp, 2000; Sierra-Barón et al., 2022), and how it can be understood, evaluated, measured, and reoriented to contribute to the sustainable use and conservation of water resources.

The situation in Colombia regarding the issues affecting water use, availability, and quality is linked to the negative effects produced by the following events:

1) The discharge of untreated wastewater into Colombian rivers and seas, which receive pollutant loads from socioeconomic activities, as well as sediments from both natural and anthropogenic erosion processes; among these, domestic and industrial wastewater from livestock, coffee, and coca production and processing, as well as mercury discharge from mining operations;

2) Agrochemicals, as the primary pollutants, are found in animal waste, antibiotics, insecticides, hormones, fertilizers, and pesticides used to treat fodder crops;

3) Eutrophication, as a process of nutrient enrichment (nitrogen and phosphorus) in aquatic ecosystems, originating from domestic and agricultural sources, results in an excess of these nutrients. This imbalance disrupts respiration and photosynthesis, leading to oxygen depletion, fish mortality, the invasion of aquatic vegetation, and the overpopulation of phytoplankton;

4) Ecological effects are related to the impacts of hydrological alterations on the transformation of aquatic ecosystems, such as wetlands, which have been altered by water demand, pollution, land overuse, and ecosystem modification;

5) Deforestation, an increasing phenomenon in recent years, is associated with, among other factors, the expansion of the agricultural and livestock frontier, food demands related to population growth, the establishment of illicit crops, overexploitation of mineral resources, and the establishment of monocultures;

6) Heavy metals related to mining processes contribute a significant number of pollutants to water sources, with high concentrations of mercury, which are associated with activities such as gold mining, oil extraction, and industrial and agricultural activities;

7) Emerging pollutants, associated with chemical compounds that pose environmental consequences and health risks, are poorly understood in terms of their presence, impact, and treatment. These include pesticides, pharmaceuticals, illicit drugs, personal care products, and other substances not yet regulated;

8) Salinization of surface and groundwater, coastal erosion, and flooding of certain areas are effects caused by sea level rise. One of its consequences is the disruption of migration patterns for reproduction in some aquatic species (IDEAM, 2023; Ruiz et al., 2020).

This scenario has had repercussions in various regions of the country, and the Southern Colombian region is no exception to this issue. In the specific case of the department of Huila, the deterioration of water basins is driven by deforestation and hydroelectric power generation. The Institutional Action Plan 2020-2023, “Huila Biodiverso, Sostenible y Productivo,” presents indicators that reflect the impact on water quality and vulnerability to shortages, highlighting critical conditions in certain areas. The primary sources of pollution in water

bodies in the department of Huila stem from domestic wastewater (Corporación Autónoma Regional del Alto Magdalena [CAM], 2020).

There is evidence suggesting that behaviors and certain psychological dispositions, such as personal attitudes, promote environmental care and preservation (Carmi, 2013; De Sario et al., 2023; Franzen & Meyer, 2010; Ogunbode & Arnold, 2012; Schultz et al., 2005). These factors also counteract non-ecological and unsustainable consumption patterns (Molano et al., 2023). In this sense, identifying the factors that most influence pro-environmental behavior makes improving the design and management of development measures and policies possible (World Bank, 2015). This also helps determine the most appropriate routes and strategies to promote greater awareness, responsibility, and respect for the environment, along with understanding the effects of one's own behavior (Navarro et al., 2022; Pérez & Camacho, 2023; Richardson et al., 2009).

The scientific literature defines behaviors that are performed in favor of the environment as “pro-environmental behaviors.” These behaviors are described as those that “consciously seek to minimize the negative impact of one's actions on the natural and built world” (Kollmuss & Agyeman, 2002, p. 240). Steg and Vlek (2009) suggest that these behaviors are actions undertaken by individuals with the primary intention of benefiting the environment or minimizing harm to it. These behaviors are often motivated by awareness of environmental issues and a desire to contribute to the preservation or restoration of the environment.

Kurisu (2015) notes that several alternative terms are commonly used to refer to pro-environmental behaviors, including environmental behavior (Van Liere & Dunlap, 1978), ecological behavior (Kaiser & Fuhrer, 2003), environmentally responsible behavior (Thøgersen, 2004; Hines et al., 1987), environmentally significant behavior (Stern, 2000), and environmentally related behavior (Bamberg, 2003). A special mention should be made of the concept of “sustainable behavior,” which refers to actions taken by individuals or groups to meet present needs while ensuring that the ability of future generations to meet their own needs is not compromised (Corral-Verdugo, 2010). This concept integrates environmental, social, and economic considerations into decision-making processes, emphasizing the balance between these three dimensions. Sustainable behavior extends beyond environmental protection, incorporating practices that promote social equity, economic viability, and support long-term ecological health and human well-being (Corral-Verdugo, 2012).

Although closely related to pro-environmental behavior, sustainable behavior encompasses a broader range of actions and considerations, integrating long-term ecological health with social equity and economic frugality. While pro-environmental behavior often focuses specifically on actions that benefit the environment, sustainable behavior requires a more holistic approach, balancing environmental,

social, and economic dimensions. In this regard, while all pro-environmental behaviors can be considered part of sustainable behavior, not all sustainable behaviors are strictly pro-environmental.

In his review, Kurisu (2015) identified a list of widely recognized pro-environmental behaviors, which he classified into categories aimed at reducing: a) greenhouse gases, b) air pollutants, c) water pollutants, d) resource consumption, and e) alterations to the natural environment. Examples of pro-environmental behaviors include recycling, reducing energy consumption, using public transportation to lower carbon emissions, and conserving water.

Therefore, developing approaches that assess different types of pro-environmental behaviors for which appropriate tools for accurate measurement are needed is essential. These tools include general and domain-specific self-report measures (such as surveys and questionnaires), field observations assisted by key informants, the use of technical devices, and controlled behavioral tasks conducted in laboratory environments (Lange & Dewitte, 2019). In general, self-report measures assess the frequency of various behaviors with an environmental impact, such as recycling, using transportation alternatives, and conserving energy and water. These measures are commonly used for their convenience and ease of analysis, although they are more susceptible to socially desirable responses and acquiescence bias (Deltomme et al., 2023).

Many of the psychometric instruments available for measuring behaviors related to environmental care and preservation in various contexts (Herrera et al., 2018; Sierra-Barón et al., 2021; Sierra-Barón et al., 2023; Sierra-Barón et al., 2018; Sierra & Meneses, 2022; Sierra-Barón & Saza-Quintero, 2023; Vanegas et al., 2018) are primarily based on the “Theory of Reasoned Action” (TAR) (Fishbein & Ajzen, 1975; 2011) and the “Theory of Planned Behavior” (TPB) (Ajzen, 1991; 2011; 2020). Both theories have been widely used to explain the factors that precede pro-environmental behaviors in educational contexts (Sandoval-Escobar et al., 2019; Saza-Quintero et al., 2021), organizational settings, and among the general population (Lam, 2006; Sierra-Barón & Meneses, 2018), as well as in the acquisition of healthy behaviors (Fishbein, 2008). Other instruments used to measure pro-environmental behaviors in the Latin American context are discussed in Arteta (2022).

Pro-environmental behavior is a significant predictor of water conservation, as individuals with pro-environmental attitudes are more likely to conserve water than those without such attitudes (Adams, 2014). Several measurement instruments have been developed to assess water consumption habits in households, educational settings, and organizations (Hoekstra et al., 2011; Mendieta & Gutiérrez, 2014; Sierra-Barón et al., 2018; Solis-Salazar, 2010).

Additionally, there are instruments that measure other psychological dispositions linked to water-saving behavior, such as attitudes, intentions, perceived rights, and beliefs (Corral-Verdugo et al., 2003; Gilg & Barr, 2006; Lam, 2006; Randolph & Troy, 2008; Reddy et al., 2023; Willis et al., 2011). The focus of this work is on water conservation and saving behavior, understanding these activities as a specific type of pro-environmental behavior, as well as the measures that study said behavior.

Among other instruments cited in the literature for measuring this construct, the Water Conservation Practices Scale (Dolnicar et al., 2012) is notable. It measures 17 specific self-reported water conservation behaviors. Additionally, measures that have previously been found to influence conservation behavior—such as environmental attitudes, altruism, pro-environmental behavior, moral obligation, environmental knowledge, the search for information about water, and the social influence of conservation behavior—are also included. In this study, Dolnicar et al. (2012) identified two key factors that promote water conservation behavior: a high level of pro-environmental behavior and the proactive search for information about water.

Studies report the use of instruments designed for water conservation in residential settings, aiming to guide the design of behavioral interventions for water consumption in households. The design of these interventions could be influenced by factors such as promoting efficient water use, supporting the environment, and saving money. Interventions may include providing information, implementing mandatory water restrictions, and adjusting water pricing (Shan et al., 2015). Other studies use more precise measurement instruments, such as water meters, to identify factors that promote water conservation, including social norms, social identity, and personal identity approaches (Seyranian et al., 2015).

The Home Water Conservation Scale (Fielding et al., 2013) measures water conservation behaviors both inside and outside the home, with a Cronbach's Alpha of 0.86. This instrument aimed to identify key factors for designing effective water use campaigns. It highlighted the importance of viewing water use as a collective behavior influenced by household dynamics. By promoting good water-saving habits, it emphasized the need for policies that foster long-term cultural changes.

Most of these instruments have been used in European countries, some in Australia and others in the Latin American context. In Mexico, the "Water Savings Report" scale, consisting of 14 actions related to water conservation ( $\alpha = 0.84$ ), was used to identify relationships between saving behaviors, perceptions of justice, and the legitimacy of authorities (Estrella, 2016). A total of 472 people participated in this study, contributing to the payment of monthly water consumption and/or performing household cleaning tasks. The structural model proposed in the study presented an explanatory percentage of nine.



Among the Colombian psychometric studies aiming to contribute to the reliability and validity indices of instruments for measuring pro-environmental behaviors is the work of Sierra-Barón and Saza-Quintero (2023). They conducted a convergent and divergent validation of the Pro-Environmental Behavior Index (PBI) using an environmental knowledge scale, an exploratory factor analysis, and an internal consistency analysis with McDonald's  $\omega$ , based on a sample of 980 participants. The full instrumentation explained 52.83% of the variance, with most items having a saturation exceeding 0.40, and they were grouped into five categories. This instrument measures the PBI with adequate levels of validity and reliability.

Another Colombian study aimed to establish psychometric indicators for the Pro-Environmental Attitudes Questionnaire (PEAQ) using a sample of 415 participants. The linguistically adapted PEAQ for the country demonstrated one-dimensionality, with an explained variance of 43%, and reliability coefficients of  $\alpha = 0.95$  and  $\Omega = 0.95$ . The Rasch analysis yielded a person reliability of 0.90 and item reliability of 0.95. In this study, statistically significant correlations were also found with other scales, including the Environmental Awareness scale 0.859, ( $p \leq 0.001$ ), the Environmental Values scale = 0.795 ( $p \leq 0.001$ ), and the Pro-Environmental Behavior Questionnaire at Work 0.885 ( $p \leq 0.001$ ). The psychometric indicators of the Colombian version support the PEAQ as a valid and reliable instrument for measuring pro-environmental attitudes in the country (Sierra & Meneses, 2022).

In Colombia, there are few instruments available that focus on promoting and improving sustainable environmental practices, particularly those that influence human behavior (Sierra-Barón & Meneses, 2022). Moreover, there is a lack of measurement instruments specifically designed to assess water conservation, which would allow for establishing baselines for intervention design and monitoring behaviors related to water care and saving. Such actions could contribute to promoting and strengthening the sustainable use, conservation, and saving of water resources.

Given that water sources are essential for the survival and development of life on Earth, and, of course, in Colombia, conducting psychometric studies that contribute to the construction, adaptation, translation, validation, and good practices in evaluating psychological constructs related to pro-environmental behaviors is necessary. These studies should specifically focus on the conservation of water resources, supporting the promotion of sustainable water use and conservation. For this purpose, the guidelines outlined in works such as Muñiz et al. (2013) and Muñiz and Fonseca-Pedrero (2019) are considered, as they provide methods for obtaining measurements with high reliability indices, allowing for a more accurate assessment of water conservation behavior. Additionally, having

self-reporting measurement instruments that enable the evaluation of the impact of behaviors related to water use is crucial.

Therefore, the aim of this article is to present evidence of the validity and reliability of the water-saving questionnaire for the Colombian population.

## Methodology

This study, which presents the psychometric properties of the “Water Savings Questionnaire” developed for the Mexican population (Estrella, 2016), is defined as cross-sectional research (Kesmodel, 2018). It is characterized by the analysis of psychological measurement instruments, either adapted from existing ones or newly created.

### Participants

A total of 1,500 people (50.2% men) participated in this study, with the majority coming from the urban sector (60.1%). The average age of participants was 32.11 years (SD = 10.10), from various regions in southwestern Colombia. Of the participants, 90.9% belonged to socioeconomic strata 1 and 2, and more than half (65.9%) reported being employed. Of the participants, 45.7% reported having a technical or technological education, while 45.3% held a university degree (see Table 1).

**Table 1.** *Sample Description.*

<b>Gender</b>	<b>f</b>	<b>%</b>	<b>Currently working</b>	<b>f</b>	<b>%</b>
Male	753	50.2	Yes	988	65.9
Female	747	49.8	No	512	34.1
<b>Sector</b>			<b>Educational Level</b>		
Urban	902	60.1	Elementary	10	.7
Rural	598	39.9	High School	31	2.1
<b>Socioeconomic Stratum</b>			Technician	312	20.8

1	175	11.7	Technology	373	24.9
2	1188	79.2	Undergraduate	679	45.3
3	128	8.5	Graduate	95	6.3
4	9	.6			

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## Instruments

The “Water Savings Report Questionnaire”, reviewed in a study by Estrella (2016) on the Mexican population, achieved a Cronbach's  $\alpha$  of 0.84. It consists of 14 items focused on the care and conservation of water, as well as its use in public services such as supply, drainage, sewage, wastewater treatment, and disposal. The items were assessed using a four-point Likert scale, ranging from “Never” to “Always.” Sociodemographic variables were assessed using an *Ad Hoc questionnaire*, specifically designed for this study.

## Procedure

The researchers structured the research protocol and advanced the respective institutional arrangements for its development, in accordance with the ethical considerations established for research with human subjects in Colombia (Resolution 8430 of 1993 and Law 1090 of 2006). The data collection instruments were administered online using *Google Forms*. The data were collected in 2022, following the World Health Organization's (WHO) declaration of the post-pandemic phase of COVID-19. All participants voluntarily agreed to take part in the study and signed the informed consent form, in which they were informed about the research objectives and the associated risks, in accordance with Resolution 8430 of 1993 and Law 1090 of 2006 issued by Colombia's Ministry of Health. In this case, there were no risks, and the confidentiality and anonymity of the data were guaranteed.

## Data Analysis

A description of the items was provided, considering their mean, standard deviation, skewness, and kurtosis. Additionally, a Kolmogorov-Smirnov analysis was conducted to assess whether the variable followed a parametric distribution. A

comparative analysis was also carried out to determine statistical differences in the scores based on sample characteristics, using *Students' t-test* and *one-way ANOVA*.

To determine factor groupings, an exploratory factor analysis using principal component analysis was conducted, with a direct Oblimin rotation. Finally, the internal consistency analysis was done with McDonald's  $\omega$  and Cronbach's  $\alpha$ . For the development of the statistical procedures, the SPSS-26 ® and JAMOV 2.3 ® software were used.

### Results

Table 2 shows the descriptive statistics of the items. All items exhibit negative skewness and a platykurtic tendency. This is confirmed by the Kolmogorov-Smirnov test, which indicates a non-parametric data distribution.

**Table 2.** *Item Descriptions.*

	Mean (95% C.I.)	Of	Skewness	Kurtosis
Item 1	3.3 (3.26-3.34)	.82	-.92	-.02
Item 2	3.42 (3.48-3.46)	.88	-1.41	.98
Item 3	3.38 (3.34-3.43)	.92	-1.29	.46
Item 4	3.32 (3.27-3.37)	.98	-1.23	.23
Item 5	3.27 (3.22-3.32)	1.02	-1.11	-.13
Item 6	3.24 (3.18-3.29)	1.06	-1.10	-.21
Item 7	3.39 (3.34-3.43)	.90	-1.34	.74
Item 8	3.36 (3.31-3.41)	.95	-1.32	.55
Item 9	3.32 (3.27-3.37)	.96	-1.22	.29
Item 10	3.3 (3.25-3.35)	.99	-1.22	.23
Item 11	3.25 (3.20-3.20)	1.04	-1.13	-.11
Item 12	3.28 (3.23-3.33)	.99	-1.14	.03
Item 13	3.28 (3.23-3.33)	.97	-1.14	.09
Item 14	3.31 (3.26-3.36)	1.00	-1.21	.13

The comparative analysis based on sociodemographic variables (Table 3) revealed significant differences across all criteria, except for sex.

**Table 3.** *Statistical Differences According to the Socio-demographic Variables Described.*

<b>Variables</b>	<b>M (Of)</b>	<b>Intergroup Differences (p)</b>
<b>Gender</b>		.773 ( $p = .366$ )
1. Woman	3.33 (.54)	
2. Man	3.31 (.56)	
<b>Sector</b>		5.68 ( $p < .001$ )
1. Urban	3.39 (.53)	
2. Rural	3.22 (.57)	
<b>Currently working</b>		3.10 ( $p = .002$ )
1. Yes	3.29 (.55)	
2. No	3.38 (.54)	
<b>Education Level</b>		32.60 ( $p < .001$ )
1. Elementary	3.00 (.53)	
2. High School	2.69 (.68)	
3. Technician	3.37 (.50)	
4. Technologist	3.41 (.47)	
5. University	3.35 (.56)	
6. Postgraduate	2.84 (.52)	
<b>Socioeconomic Stratum</b>		35.78 ( $p < .001$ )
1	2.99 (.63)	
2	3.40 (.49)	
3	3.05 (.65)	
4	2.68 (.76)	

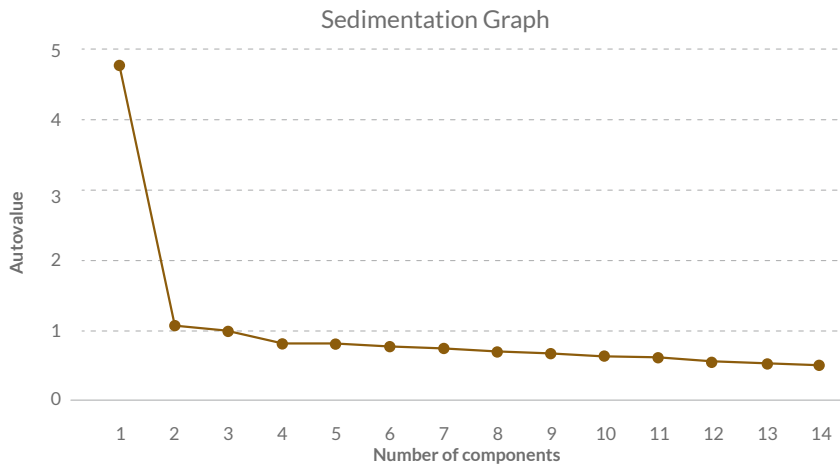
The Kaiser-Meyer-Olkin (KMO) test  $KMO = 0.926$ ,  $\chi^2 = 4777.18$ ,  $p < 0.01$  indicates that the sample is sufficient for conducting a reliable factor analysis. Additionally, the full test accounts for 41.55% of the variance of the construct.

However, items 1 and 2, which form one of the two identified subscales, exhibit an item-test correlation below 0.25 (Table 4).

**Table 4.** *Factor Load, Extraction, Item Correlations - Test and Internal Consistency if the Item is Deleted.*

	Factor 1	Factor 2	Extraction	Item-total Correlation	Cronbach's $\alpha$ if element is deleted	McDonald's $\omega$ if item is deleted
Ítem 1		.753	.57	.116	.851	.852
Ítem 2		.703	.504	.231	.846	.847
Ítem 3	.591		.356	.503	.831	.831
Ítem 4	.634		.405	.534	.829	.829
Ítem 5	.678		.462	.577	.826	.826
Ítem 6	.653		.445	.54	.828	.829
Ítem 7	.472		.235	.394	.837	.838
Ítem 8	.612		.378	.522	.83	.83
Ítem 9	.619		.383	.523	.83	.83
Ítem 10	.64		.411	.545	.828	.829
Ítem 11	.688		.476	.586	.825	.826
Ítem 12	.648		.421	.554	.828	.828
Ítem 13	.614		.38	.511	.83	.831
Ítem 14	.614		.391	.53	.829	.83

Furthermore, the distribution of the items into two factors is confirmed, as shown in the sedimentation graph (Figure 1).



**Figure 1.** *Sedimentation Graph for the Water Saving Questionnaire Application.*

Finally, the internal consistency analysis indicates that the full scale has a McDonald's  $\omega$  of 0.849 (95% CI = 0.838–0.860) and a Cronbach's  $\alpha$  of 0.843 (95% CI = 0.831–0.854).

## Discussion

The objective of this study was to present evidence of the validity and reliability of the “Water Savings Questionnaire” in the Colombian population. Together with other instruments designed to measure self-reported behaviors related to water use and conservation, this tool has played an important role in assessing environmental management practices across different contexts. One such instrument is the household survey developed by Estrella (2016), which emphasizes the importance of gathering information to understand behavioral dynamics related to water use and conservation in the context of household public services (such as drinking water, sewerage, wastewater treatment, and disposal), as well as the association between these practices and the economic costs of service provision.

Another context in which this instrument has been applied is educational settings (Ramírez-Segado et al., 2021). The measures obtained provide valuable insights into dynamics related to water consumption habits, teaching and learning processes concerning water, efficient use of institutional resources, and curricular content associated with water management. Research has been conducted both in basic education (Mendieta & Gutiérrez, 2014) and in university programs (Sierra-Barón et al., 2018).

In organizational contexts, practices related to proper water treatment, use, management, and disposal are fundamental, framed within social, business, legal, and environmental responsibilities (Sierra-Barón & Meneses, 2018; Vallet-Bellmunt et al., 2023; Zhang et al., 2021). In these scenarios, self-report questionnaires are essential tools for evaluating, measuring, monitoring, and controlling water resources, particularly in identifying behaviors that help minimize environmental risks.

Water conservation behaviors—understood as specific actions aimed at preventing, minimizing, or mitigating the negative environmental impacts of human activity—are closely linked to both individual and social practices within various organizations. Therefore, fostering desirable behaviors and promoting good environmental practices are essential to minimizing the environmental impact on water resources (Fielding et al., 2013; Pol et al., 2010; Shan et al., 2015).

In the Colombian context, community water management within the framework of the post-conflict period with the FARC-EP also proves to be a suitable setting for applying the instrument as a resource. This can be contrasted with issues typically associated with this phenomenon, such as inadequate infrastructure for drinking water supply, deforestation, contamination of water sources, demands for water provision, and the limited capacity for institutional water resource management (Alvarado et al., 2022; Valencia & Ecuyer, 2023).

The “Water Savings Report Questionnaire” submitted for analysis is a promising instrument that can inform the design of local interventions. These interventions have demonstrated effectiveness in promoting water conservation behavior (Fielding et al., 2013). Likewise, the questionnaire can serve as a valuable input for decision-making and the development of public policies aimed at promoting water-saving behaviors in diverse contexts (Lam, 2006; Reddy et al., 2023; Shan et al., 2015; Willis et al., 2011).

The results of this study indicate that all items contributed above 0.30 to their respective factors, justifying the retention of all items (Méndez & Rondón, 2012). Likewise, the complete instrument explains over 0.40 of the total variances of the construct, demonstrating its usefulness in measuring the targeted construct. On the other hand, the instrument demonstrates high internal consistency indices without becoming redundant (Frías-Navarro, 2022). These indices are very similar to those of the original Mexican scale by Estrella (2016), which reported a Cronbach’s  $\alpha$  of 0.848. Therefore, it is expected that the instrument will yield reliable measurements without collinearity between the items.

It was evidenced that two items (1 and 2) have an item-test correlation < 0.25, grouped into a factor. These results can serve as a guide for future research that considers aspects such as relevance, wording, item placement, and the operationalization of common water use and consumption practices. They also



suggest conducting a second study to test the hypothesis that the instrument might perform better by removing these items, despite it becoming univariate and deviating from the original configuration validated in the Mexican population (Estrella, 2016).

Some limitations must be considered when interpreting the results of this study, one of which is that it was conducted with the general population. Conducting future studies focusing on specific population sectors, such as education, health, the business sector, and victims of armed conflict, among others is advisable. Another limitation is related to social and health changes documented during the pandemic and post-pandemic periods, which may have influenced water use and conservation behaviors. For this reason, carrying out new studies that consider social and health factors that may influence the results is recommended. The "Water Savings Report Questionnaire" presents certain limitations that may affect the accuracy of the measurements. One of these limitations is that the reported behaviors are self-reported rather than directly observed. This could introduce a bias related to social desirability and convenience (Brown et al., 2014; Kormos & Gifford, 2014), representing a disadvantage compared to other types of measures (Seyranian et al., 2015).

## Conclusions

The "Water Savings Report Questionnaire" demonstrated reliability and validity indicators that make it a useful tool for identifying behaviors related to the environmental management of water use and care. This self-report instrument can help identify behaviors linked to the environmental management of water use and care. In turn, it can support the promotion of new environmentally responsible behaviors and good practices aimed at minimizing environmental impact. From this identification, individuals can gain insights that encourage behavioral changes and the development of habits leading to the sustainable use of water resources. Therefore, it is concluded that the version of the "Water Savings Report Questionnaire" meets sufficient psychometric quality criteria to be utilized in future research aimed at evaluating this construct within the general population. Additionally, it serves as a valuable tool for intervention and decision-making processes aimed at enhancing environmental management and promoting responsible behavior.

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# Re views

Reseñas · Resenhas

**Review: «*Del sueño a la pesadilla americana. Inmigración mexicana en Estados Unidos*»  
[From the American Dream to the American Nightmare. Mexican Immigration in the United States] by Ismael García Castro.**

*[English version]*

«Del sueño a la pesadilla americana. Inmigración mexicana en Estados Unidos» de Ismael García Castro. Reseña

Resenha de «*Del sueño a la pesadilla americana. Inmigración mexicana en Estados Unidos*» [Do sonho ao pesadelo americano. Imigração mexicana nos Estados Unidos] de Ismael García Castro

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## Abstract

In his work «*Del sueño a la pesadilla americana. Inmigración mexicana en Estados Unidos*» [From the American Dream to the American Nightmare. Mexican Immigration in the United States], Ismael García Castro examines the complex situation of migrant communities and ethnic minorities, as well as their prospects. Using a historical and hermeneutical approach, it analyzes the political discourses and contexts in which migration policies have been formulated and executed in the United States, with special attention to those that affect communities of Mexican origin. Through a critical lens, the author examines the historical, social, and political impacts of the

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xenophobic, utilitarian, pragmatic, and dehumanized migration policies implemented by that nation throughout its history. García Castro reviews the key events, laws, and discourses that have justified the exclusion and exploitation of Mexican migrant labor, revealing how the immigration system has operated as a mechanism of social and economic control. Based on the reading of this work, the hypothesis is proposed regarding the historical formation of an industry of undocumentedness, supported by: 1) the construction of a false enemy and 2) the myth of migrant invasion, along with the defense of identity and the border as a symbolic instrument, which constitute the main «products» of this industry.

**Keywords:** United States; xenophobia; utilitarianism; undocumented migration; Mexicans.

## Resumen

En su obra «Del sueño a la pesadilla americana. Inmigración mexicana en Estados Unidos», Ismael García Castro examina la compleja situación de las comunidades migrantes y minorías étnicas, así como sus perspectivas a futuro. Utilizando un enfoque histórico y hermenéutico, analiza los discursos políticos y los contextos en los que se han formulado y ejecutado las políticas migratorias en Estados Unidos, con especial atención a las que afectan a las comunidades de origen mexicano. A través de un lente crítico, el autor examina los impactos históricos, sociales y políticos de las políticas migratorias xenófobas, utilitarias, pragmáticas y deshumanizadas implementadas por dicha nación a lo largo de su historia. García Castro revisa los eventos clave, leyes y discursos que han justificado la exclusión y explotación de la mano de obra migrante mexicana, revelando cómo el sistema migratorio ha operado como un mecanismo de control social y económico. A partir de la lectura de esta obra, se plantea la hipótesis de la formación histórica de una industria de la indocumentalidad, sustentada en: 1) la construcción de un falso enemigo y 2) el mito de la invasión migrante, junto con la defensa de la identidad y la frontera como instrumento simbólico, los cuales constituyen los principales «productos» de dicha industria.

**Palabras clave:** Estados Unidos; xenofobia; utilitarismo; migración indocumentada; mexicanos.



## Resumo

Em sua obra «*Del sueño a la pesadilla americana. Inmigración mexicana en Estados Unidos*» [Do sonho ao pesadelo americano. Imigração mexicana nos Estados Unidos], Ismael García Castro examina a complexa situação das comunidades migrantes e minorias étnicas, bem como suas perspectivas para o futuro. Utilizando uma abordagem histórica e hermenêutica, o autor analisa os discursos políticos e os contextos nos quais foram formuladas e implementadas as políticas migratórias nos Estados Unidos, com especial atenção às que afetam as comunidades de origem mexicana. Por meio de uma lente crítica, García Castro investiga os impactos históricos, sociais e políticos das políticas migratórias xenófobas, utilitárias, pragmáticas e desumanizadas adotadas por essa nação ao longo de sua história. O autor revisa eventos-chave, legislações e discursos que justificaram a exclusão e exploração da força de trabalho migrante mexicana, revelando como o sistema migratório tem operado como um mecanismo de controle social e econômico. A partir da leitura dessa obra, propõe-se a hipótese da formação histórica de uma indústria da indocumentalidade, sustentada em: 1) a construção de um falso inimigo e 2) o mito da invasão migratória, juntamente com a defesa da identidade e da fronteira como instrumento simbólico, que constituem os principais "produtos" dessa indústria.

**Palavras-chave:** Estados Unidos; xenofobia; utilitarismo; migração indocumentada; mexicanos.

Ismael García Castro's book (2024) is part of the broad tradition of studies on migration and transnationalism, which have been a characteristic of consolidated researchers in our country. It is a critical work that presents a historical journey from 1776, the year in which the independence of the United States was proclaimed, to 2024, when the presidential term of Joe Biden ends, and the contest for the presidency between Kamala Harris and Donald Trump grabs the attention of the country. Throughout its 279 pages, structured in seven chapters, the author examines in detail

[...] the historical background, contexts, and impacts of legislation and government actions in the United States regarding the arrival and presence of immigrants, particularly of the undocumented population of Mexican origin, from the formation of the American nation to the present day. (p. 36).

García Castro also addresses the analysis of the impacts of the migratory phenomenon today, emphasizing the political debate generated by the growing polarization and violence towards the irregular immigrant population. This violence has become a constant danger and has increased particularly against those who come from certain countries, highlighting immigration from Mexico and Central American countries. The author points out that this has led to a system of migration based on utilitarian pragmatism, exclusion, and ethnocentrism (p. 39), which results in the constant violation of human rights due to the racial profiling prevalent in the implementation of migration policies. This system affects not only irregular migrants but also citizens, who can be detained solely on suspicion of migratory irregularity, based on their physical appearance. In addition, it has significant repercussions for the families of detainees, who face the constant threat of separation due to deportation proceedings.

The analysis presented in this paper constitutes an essential and urgent reading, both for students and for academics interested in the US immigration system, as well as for those responsible for formulating public policies. Furthermore, it is essential for those seeking to understand the foundations of American liberalism—a system characterized by granting social, political, and civil rights based on citizenship. This debate permeates all presidential administrations, which often adjust their rhetoric depending on the political gains at stake.

In turn, this work critically examines fundamental concepts and doctrines that have been present since the founding of the United States and remain influential today. These have played a crucial role in promoting values associated with the “greatness” of the United States such as the myth of American exceptionalism and Manifest Destiny (p. 41). Throughout history, its premises have served to justify practices such as the extermination and dispossession of native nations,

the importation of African slaves, as well as the exclusion and subjugation of Mexican, Chinese, and Central American migrant labor, among other abuses.

This analysis reveals, on the one hand, that the potential of power has always been implicit in the actions of the United States, and, on the other, that the power of the North American nation has been based on a historical system of human exploitation of migrant labor. This is illustrated in Chapter I, where the concept of ‘racial scripts’ proposed by Molina (cited in García, 2024) is explored, among other theories. According to this concept, in racial categorization, the issue of power is always at stake. Once these categories or “racial scripts” are formed, they are transferred to other groups, consolidating and perpetuating structures of domination and exclusion that affect various populations over time. This means, according to García (2024), that

[...] the deep racial hierarchy and exclusion embodied in the social, political, and legal system of the United States, to this day, reveals the need to recruit, permanently, an external labor force to maintain the capitalist expansion of the country that has prevailed, over the ideological aspiration to maintain a supposed racial purity or to achieve cultural homogeneity. (p. 38).

From Benjamin Franklin, in 1755 (p. 42), to Donald Trump (Chapter VII) in his two presidential campaigns, speeches have been used to feed fear and contempt for “the other”, especially towards the brown-skinned migrant; this came to signify the “Hispanic challenge” (p. 54) so much proclaimed by Samuel Huntington. In their far-right populist demagoguery, these speeches defend Anglo-Saxon supremacy, promoting a narrative of exclusion and dehumanization of immigrants, which has been used as a political tool to mobilize sectors of the population based on fear and xenophobia. In this way, Ismael García Castro enters into the exhausting hermeneutic task of describing the “true American” (p. 73); that is, the North American essence, in a context where the foreigner has no place, and which reflects the motto of “America for Americans”, extremely present in the measures imposed by Donald Trump.

Scrutiny moves towards the author's position, which stipulates that pragmatism, utilitarianism, and xenophobia (p. 124) constitute the main pillars of this historically racialized migration system. This argument is objectified through various historical events, framed in Chapter II, such as the American Constitution of 1787, the first Naturalization Law of 1790, the Treaty of Guadalupe Hidalgo, and the American Civil War, a period that laid the foundations of the migratory legal framework and that was constituted, essentially, as a “[...] labor supply system, indispensable for the economic and territorial expansion of the country” (p. 82).

The twentieth century, marked by the First World War, the Great Depression of 1929 and the Second World War, presented two different scenarios: on the one hand, the doors to migration were closed during the Great Crisis, while, on the other, the Bracero Program and other measures promoted the dynamization of the labor market, particularly that of the agricultural sector and that, nevertheless, was a labor force that once recovered the economy sought to be discarded in a petty way (Chapter III). The 21st century, on the other hand, is characterized by the change in the profile of the migrant (p. 185) and the attacks on the Twin Towers in September 2001, as a result of which the militarization of the US border was reinforced, which would later be accompanied by the crisis of 2008 (Chapter VII).

In a transversal way, in each of these periods, the author has scrutinized more than a hundred anti-immigrant laws, which arose from the xenophobic positions adopted by different presidents and local governments. Understanding the legal framework and the local and national political context in which they were created helps to establish the complex and different socio-spatial nuances, which is an essential task, that García Castro addresses rigorously to avoid possible hermeneutical biases. In his extensive reflection, the author clearly states that migrant labor has supported American finances by invigorating and stimulating the labor market, particularly during periods of expansionism and war. However, this workforce has been used as a scapegoat by both politicians and the media, which in the management of post-truth have tended to blame them for the evils that afflict the United States and have used that anti-immigrant rhetoric as an electoral bargaining chip.

The criminalization of migration, particularly of undocumented migrants of Mexican origin, has served the interests of both political and business elites. Based on the analyses presented in García Castro's work, this review hypothesizes that the United States has fostered an "industry of undocumentedness", whose characteristics are described below, taking as a reference the review of this editorial novelty; namely:

- García highlights the **historical construction of a false enemy**: Several presidents have used pseudoscientific claims based on Darwinism and eugenics (p. 100), phrases from organic ideologues of white supremacy such as Peter Brimelow (p. 164) and Patrick Buchanan. The latter, author of the phrase "Put America First" (p. 177) presents the migrant, especially the undocumented, as a threat. This is configured as the main characteristic by which the United States justifies subsequent actions in its immigration policy.

- **The myth of the migrant invasion, the defense of identity, and the border as a symbolic instrument as the main products of the undocumented industry:** the author criticizes the myth of the migrant invasion, called a “chronic moral illness” (p. 165), a media and political construction. In this logic of invasion, the border stands as a symbolic instrument (p. 223) that delimits the imaginary confines of American identity and is given budgetary priority. Only in the periods of 1929-1933 was the budget for the Border Patrol doubled to increase surveillance efforts to prevent the passage of irregular immigrants, especially at the southern border (pp. 118-119). Subsequently, between 1978 and 1988, the budget of this government agency quadrupled (Chap. VI). In these almost 60 years, the main objective was the expulsion of migrants who were already in the United States. In the period from 1993 to 2001, under the mandate of Bill Clinton, the Immigration and Customs Enforcement Service (ICE) was granted twice as much budget as its predecessor, allocating 800 million, and increasing by 117% the number of Border Patrol officers on the border with Mexico (Cap VI). Migration policy consisted not only of expulsion but also of deterrence. Donald Trump, for his part, also carried out large deportations, including DACA recipients (p. 245). All of this has been done even though, in reality, there is no tangible threat endangering this identity. García provides strong evidence to disprove the myth of the invasion, as an example of this is that although “[...] the budget of the immigration agencies of the US Government has multiplied in the last two decades [...] the number of detentions of undocumented immigrants has remained stable, even decreased significantly since 2005” (p. 194).

In this sense, it is possible to argue that the «undocumented industry» works similarly to any other industry, generating artificial needs designed to meet the interests of key actors such as the ICE, the Border Patrol, employers, arms suppliers, and far-right conservative voters.

The economic greatness of the United States is sustained by the migrant population, especially the undocumented, which generates large profits for companies that have historically employed Mexican workers without any guarantee of their working conditions, maintaining low wages (p. 126) and with difficulties in forming unions (p. 162). In this sense, the United States finds it usefully convenient to perpetuate undocumented status, since it maintains a vulnerable workforce that favors business and political interests, which are sometimes combined.

In conclusion, the author urges to maintain a balanced perspective in the face of the change of governments, particularly the Democrats, who, despite their

apparent reformist intentions, have implemented strict deportation policies; as evidenced in the administrations of Bill Clinton and Barack Obama. However, we must not succumb to defeat either, as social movements, such as the “Dreamer Movement”, have made significant progress, although they currently face organizational challenges that must be overcome.

The work clearly demonstrates that the American justice system is meritocratic; therefore, migrant communities must continue striving for greater inclusion (p. 278). From this work, the author could explore two possible lines of research: On the one hand, the study of Trumpism as an ultraconservative movement and its implications for migration policies; on the other, the proposal of a scheme that, beyond immigration reform, seeks to guarantee the protection of the fundamental rights of the migrant population.

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