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Commentary

Understanding the Quartile Conundrum: Research Evaluation in Spain and Latin America

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Abstract

Quartile rankings of journals have become shorthand for research quality in many national evaluation systems. This Commentary offers a non-systematic documentary analysis of this phenomenon in Spain and selected Latin American systems. It conceptualizes these arrangements as quartile regimes: configurations of rules, indicators, organizational routines, and incentives that make the Journal Citation Reports or SCImago quartile position of a journal function as a high-stakes proxy for research quality. The article draws on legal and policy texts, agency criteria, reform documents, peer-reviewed literature, and selected integrity cases used as illustrative vignettes rather than prevalence evidence. Spain is analyzed as an early and influential case in which sexenios and accreditation made journal indicators central to individual careers, although the 2024 sexenio criteria now move explicitly toward qualitative narratives, broader outputs, and responsible indicators. Mexico, Brazil, Colombia, Argentina, and Peru are treated as purposive Latin American cases that show distinct pathways through individual recognition schemes, graduate-program evaluation, journal-indexing systems, career committees, and publication bonuses. The article argues that quartile regimes reshape publication language, research agendas, disciplinary hierarchies, authorship practices, and integrity risks, with particularly strong effects in the social sciences and humanities and in regional journal ecosystems. Current reform efforts, including the Agreement on Reforming Research Assessment, the Coalition for Advancing Research Assessment, FOLEC-CLACSO, and the ALAEC manifesto, show that quartiles can be repositioned as weak contextual signals within broader, field-sensitive frameworks that value quality, bibliodiversity, multilingual communication, open science, and societal relevance.

Keywords: research evaluation; quartiles; journal metrics; Spain; Latin America; CoARA; FOLEC-CLACSO; bibliodiversity; research integrity; responsible research assessment

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1. Introduction: Where Quartiles Came from and Why They Spread

Quartile classifications build on the Journal Impact Factor, introduced by Eugene Garfield as part of a bibliographic infrastructure designed to help librarians and researchers navigate journal studies rather than to judge the quality of individual papers or researchers

(Garfield, 2006). Later, database providers converted journal citation indicators into subject-category league tables. Clarivate's Journal Citation Reports and the SCImago Journal & Country rank journals within categories and assign them to quartiles, from Q1 to Q4, according to citation-derived indicators (Clarivate, 2025; SCImago, n.d.). In this context, equal groups mean roughly equal numbers of journals within a given database, year, and subject category. It does not mean equal scientific value, equivalent coverage across databases, or the same number of journals in each quartile across fields. A Q1 label in one database or category is therefore not interchangeable with Q1 in another.

The simplicity that made quartiles attractive also made them distorted. By the 2000s, hiring, promotion, funding, and graduate-program evaluation systems in many countries had begun using the quartile of a journal as a quickly legible proxy for the merit of articles published in that venue. This proxy seemed objective, auditable, and field-normalized. It also seemed to offer a partial answer to long-standing concerns about localism, endogamy, and opacity in academic recruitment. Yet the same proxy can displace direct evaluation of research content, particularly when evaluators use the journal category as a shortcut rather than as limited contextual information.

International reform initiatives have repeatedly cautioned against this substitution. The San Francisco Declaration on Research Assessment (DORA) argues that journal-level metrics should not be used as surrogate measures of research quality at the article or researcher level (DORA, 2012). The Leiden Manifesto for research metrics similarly states that quantitative indicators should support, not replace, expert judgment; that assessment must be transparent; and that field, mission, and language diversity matter (Hicks et al., 2015). These principles provide a useful lens for examining Spain and Latin America, where journal quartiles have often moved from being descriptors of journals to becoming instruments of career governance.

The article advances three linked arguments. First, the notion of quartile regimes captures a specific institutional form of metric-based evaluation in which journal quartile positions become high-stakes policy objects. Second, Spain and Latin America show both convergence and variation: Spain developed a tightly coupled system around sexenios and accreditation, whereas Latin American systems adapted journal indicators through more heterogeneous recognition, indexing, and incentive schemes. Third, current reform coalitions are not simply rejecting indicators. They are attempting to redesign the relationship between indicators, qualitative judgment, disciplinary specificity, and public value.

2. Scope, Corpus, and Analytical Approach

This article is a commentary based on a documentary approach. It is not a systematic review, a meta-analysis, or an exhaustive regional survey. Its purpose is conceptual and comparative: to clarify how quartile-based signals become institutionalized, to identify mechanisms through which they affect scholarly practice, and to connect those mechanisms with current reform debates.

The corpus was assembled purposively rather than through a formal search protocol. It includes four kinds of material. First, it uses legal and policy documents that define or shape research assessment, including Spanish state regulations, Agencia Nacional de Evaluación de la Calidad y Acreditación (ANECA) and Comisión Nacional Evaluadora de la Actividad Investigadora (CNEAI) criteria, Brazilian Coordenação de Aperfeiçoamento de Pessoal de Nível Superior (CAPES) documents, Mexican Secretaría de Ciencia, Humanidades, Tecnología e Innovación (SECIHTI; successor to CONAHCYT) parameters for the Sistema Nacional de Investigadoras e Investigadores (SNII), Colombian Ministerio de Ciencia, Tecnología e Innovación (Minciencias) and Publindex materials, and documents connected with Consejo Nacional de Investigaciones Científicas y Técnicas (CONICET)

debates in Argentina. Second, it draws on peer-reviewed studies and scholarly editorials on research evaluation, publishing circuits, language, and metric effects. Third, it uses reform documents from DORA, the Leiden Manifesto, the Agreement on Reforming Research Assessment (ARRA), the Coalition for Advancing Research Assessment (CoARA), the Foro Latinoamericano de Evaluación Científica of the Consejo Latinoamericano de Ciencias Sociales (FOLEC-CLACSO), and the Asociación Latinoamericana de Editores Científicos (ALAEC). Fourth, it includes media investigations and integrity reports only as illustrative vignettes where they clarify plausible mechanisms that also appear in the academic literature.

The cases were selected to maximize analytical contrast within a limited commentary format. Spain is included because it is an early and influential example of high-stakes individual evaluation based on journal indicators. Mexico, Brazil, Colombia, Argentina, and Peru are included because each represents a distinct pathway of institutionalization in Latin America: individual researcher recognition, graduate-program evaluation, journal indexing and group evaluation, committee-based career evaluation, and direct publication-bonus incentives. The exclusion of other countries, such as Chile, Uruguay, Ecuador, or Costa Rica, should not be read as an assessment of their importance. The scope was restricted to cases that make the mechanisms visible with sufficient documentary evidence and that allow comparison without implying a comprehensive typology of the region.

The analysis proceeds through three criteria. It asks, first, whether quartile or indexing indicators are formally embedded in rules, criteria, or scoring systems; second, whether those indicators are tied to concrete incentives such as salary supplements, promotion, program scores, institutional prestige, or bonuses; and third, whether the documentary and scholarly literature reports behavioral effects in publication language, venue choice, agenda selection, authorship, or integrity. The resulting interpretation is necessarily cautious. The article identifies mechanisms and boundary conditions; it does not estimate prevalence or causal effects across the region.

3. Conceptualizing Quartile Regimes

A quartile regime is a configuration of formal rules, informal expectations, evaluative routines, and incentives that makes journal quartile placement a high-stakes proxy for research quality. The concept overlaps with broader ideas such as audit culture, metric fixation, and Goodhart-like target effects, but it is narrower. It focuses on the institutional translation of an ordinal journal-category signal into decisions about researchers, programs, departments, and universities.

The concept has four analytical boundaries. First, a quartile regime is not created by the mere existence of JCR or SJR quartiles. It emerges when these categories enter career and funding decisions with enough weight to shape behavior. Second, the regime may be explicit, as when criteria name Q1 or Q2 journals, or implicit, as when committees treat indexed top-quartile publications as the safest evidence of quality. Third, quartile regimes are field-dependent because journal coverage, citation density, authorship norms, publication language, and document types differ across disciplines. Fourth, the strength of the regime depends on the incentive channel. A quartile signal is more powerful when connected to salary, promotion, graduate-program ranking, or cash bonuses than when used only as contextual information.

The mechanism is also specific. Quartile regimes first substitute a venue signal for evaluation of content. They then couple that signal to institutional rewards, which makes researchers anticipate the metric during project design and manuscript preparation. This anticipation shapes venue choice, language choice, collaboration strategies, and the selection of topics more likely to travel through internationally indexed journals. Finally,

the regime feeds back into national journal ecosystems: journals outside the dominant databases struggle to attract submissions, and regional infrastructures must compete with global indexing services whose coverage and categories do not necessarily match local research missions.

4. Spain: From Anti-Endogamy Tools to Reform of Legacy Indicators

The Spanish case cannot be understood only as a story of technocratic metric adoption. Bibliometric criteria also appeared attractive because Spanish academia had long faced concerns about endogamy, opaque hiring, and uneven quality control. In that setting, external indicators seemed to offer transparency and comparability. Real Decreto 1086/1989 created performance-based complements for university staff and enabled the subsequent practice of sexenios, six-year research assessment segments that can carry salary and prestige effects (BOE, 1989). Over time, sexenios became one of the most visible instruments through which bibliometric evidence entered academic careers.

Research on the Spanish system has shown that CNEAI evaluation and impact-factor incentives contributed to stronger international visibility, but also to changes in publication behavior and a growing dependence on journal-based indicators (Jiménez-Contreras et al., 2003; Marini, 2018). In many fields, positive evaluation became associated with publication in high-impact journals and, in practice, with Q1 or Q2 positions. Accreditation criteria and local university regulations reinforced that expectation. Some doctoral regulations also illustrate the diffusion of the logic beyond evaluation agencies: for example, the Universidad Politécnica de Madrid requires, for some thesis-by-publication routes, three articles in JCR or Scopus Q1 or Q2 journals (UPM, 2017). This example is not presented as a national rule, but it shows how journal quartiles can become embedded in institutional routines at multiple career stages.

The effects were not uniform across fields. In experimental and biomedical sciences, article publication in international journals is often aligned with dominant disciplinary norms. In the social sciences and humanities, however, journal indicators fit less well with books, national-language publication, local publics, and slower research cycles. Studies of philosophy and ethics in Spain report perceived effects on publication habits, language choices, research agendas, academic collaboration, and forms of pressure linked to metricized evaluation (Feenstra & Delgado López-Cózar, 2023). These effects are consistent with broader concerns that evaluation systems designed around a narrow set of journal indicators can undervalue monographs, edited volumes, regional journals, applied outputs, and public scholarship.

It is important to state the current reform accurately. The 2024 sexenio criteria should not be described as emphasizing Q1/Q2 thresholds as core criteria. ANECA announced that the 2024 resolution maintains the expansion of contribution types, advances toward qualitative evaluation supported by responsible quantitative indicators, and states that assessment of articles cannot be reduced to journal impact factors. It also eliminated references to orientative minima because such minima would point directly or indirectly to publication-venue indicators rather than to the quality of contributions (ANECA, 2024; CNEAI, 2024). The current Spanish case is therefore a case of legacy quartile dependence under active reform, not a static continuation of the older threshold model.

5. Latin American Adaptations: Similar Signals, Different Institutional Pathways

Latin American systems did not simply copy Spain. They adapted journal and indexing indicators under different political economies of science, different levels of university funding, and different relations between national and regional publishing

infrastructures. A shared feature is the growing value attached to internationally indexed publications, especially in Web of Science and Scopus. The institutional mechanisms, however, differ substantially.

In Mexico, the SNII rewards recognized research careers through level-specific evaluation. Current SECIHTI parameters use multiple research products and area-specific criteria, and the parameters organize output profiles using quartiles within area and level distributions. This is not identical to using journal quartiles as direct thresholds, but it shows how quantification and differentiated publication profiles remain central to recognition (SECIHTI, 2026). In Brazil, Qualis Periódicos historically classified journals into strata that affected graduate-program evaluation and shaped publication incentives. That historical effect remains important in the literature (Jaffé, 2020). Yet CAPES has announced a major change for the 2025–2028 cycle: articles, not journals, will be classified, and evaluation will combine indicators of journals, indicators of articles, and qualitative procedures so that different articles in the same journal may receive different classifications (CAPES, 2025a, 2025b). Brazil is thus moving from a journal-strata regime toward a hybrid article-oriented model.

Colombia represents a different pathway. Publindex classifies national journals and shapes prestige hierarchies for venues, while Minciencias materials also connect article categories to the quartiles of journals in Scopus/SJR and Web of Science/JCR. In the 2024 call for research group recognition, articles were categorized using journal quartiles: Q1 as A1, Q2 as A2, Q3 as B, and Q4 as C, with additional Publindex categories for national journals (Minciencias, 2025). Argentina has relied more on committee-based evaluation in CONICET and universities, but scholars have documented the tension between mainstream international circuits, regional open-access infrastructures, and national publication circuits in CONICET evaluations (Beigel, 2014). Peru adds another mechanism: publication bonuses and high-stakes institutional rewards can create opportunities for authorship markets when oversight is weak. Recent analyses of Peru describe a black market for authorship and connect it to bonus systems that reward publications in high-quartile journals (Alhuay-Quispe & Yance-Yupari, 2025).

Table 1 summarizes the selected national pathways. It is deliberately schematic. The purpose is to identify differences in how quartile and indexing signals are used, not to rank national systems or imply that all institutions within a country behave in the same way.

Table 1. Selected national approaches to quartile and indexing indicators in research evaluation.

Country/System	How Quartiles or Indexing Operate	Main Incentive Channel	Disciplinary Sensitivity and Current Caveat
Spain: sexenios, accreditation, doctoral rules	Historically, high-impact JCR placement and Q1/Q2 expectations became central in many fields. Some university rules still use Q1/Q2 for thesis-by-publication pathways.	Salary complements, accreditation, promotion, doctoral milestones, and prestige.	Effects differ by field. The 2024 sexenio criteria move away from orientative minima and venue-threshold logic toward qualitative narratives and responsible indicators.
Mexico: SNII under SECIHTI	Current parameters use area-specific products and output-profile quartiles by area and level; indexing and visibility remain important but journal quartile thresholds vary by field and committee.	Researcher recognition, status levels, and associated incentives.	Humanities and social sciences include books, chapters, and other products, but indexed journal outputs still carry symbolic weight.

Table 1. *Cont.*

Country/System	How Quartiles or Indexing Operate	Main Incentive Channel	Disciplinary Sensitivity and Current Caveat
Brazil: CAPES evaluation	Qualis Periódicos historically classified journals and influenced graduate-program strategies. CAPES now states that the 2025–2028 cycle will classify articles, not journals, through hybrid procedures.	Graduate-program evaluation, program grades, institutional prestige, and resource allocation.	The reform reduces direct journal-strata dependence but still uses journal and article indicators, combined with qualitative procedures.
Colombia: Minciencias/Publindex	Publindex classifies national journals; Minciencias documents also categorize articles through JCR/SJR quartiles, for example Q1 = A1, Q2 = A2, Q3 = B, Q4 = C in group-recognition materials.	Research-group classification, journal prestige, institutional reporting, and career incentives.	Regional journals gain recognition through Publindex, but global-index quartiles continue to shape hierarchies.
Argentina: CONICET and university committees	No single national quartile rule dominates all fields, but international visibility and mainstream indexed circuits often influence committee judgments.	Career advancement, committee evaluations, and prestige within research careers.	Committee discretion creates variation; local, regional, and international publishing circuits coexist uneasily.
Peru: university incentives and integrity cases	Some institutional bonus schemes reward indexed or high-quartile publication directly, creating strong incentives around venue placement.	Cash bonuses, institutional rankings, and career recognition.	Evidence should be framed cautiously. Recent reports and peer-reviewed analysis describe authorship markets, but they do not establish prevalence across all institutions.

6. Disciplinary, Linguistic, and Infrastructural Effects

Quartile effects are field-dependent. STEM fields often have denser journal citation networks, higher rates of co-authorship, and stronger alignment with internationally indexed article publication. The social sciences and humanities have a more mixed publication ecology: books, book chapters, national journals, essays, policy reports, creative outputs, and public scholarship can be central to knowledge production. These outputs are less visible in JCR and Scopus-based quartile systems, and citation windows may not capture their value. As a result, quartile regimes can become especially restrictive in fields where research is locally embedded, language-sensitive, or oriented toward public institutions rather than global citation markets (Nederhof, 2006; Feenstra & Delgado López-Cózar, 2023).

The language mechanism is particularly important in Spain and Latin America. Researchers who seek Q1 or Q2 journals often move toward English-language venues, even when the primary audience for the research is local practitioners, courts, schools, health systems, municipalities, or civil-society organizations. Cross-national studies show that English-language publications tend to receive higher citation visibility, while work in other languages can be disadvantaged in citation-based evaluation (Di Bitetti & Ferreras, 2017). Recent work on bibliodiversity argues that research assessment systems centered on limited, English-dominant databases reduce multilingualism and weaken publication channels that serve national and regional audiences (Snijder & Kingsley, 2024). In Latin America, editors have also reported that journals outside Web of Science and Scopus struggle to attract submissions when evaluation systems attach disproportionate value to those databases (Heredia & Viggiani, 2022).

The struggle is especially visible in the social sciences and humanities. Regional journals may be central for debates on inequality, law, education, public health, urban

policy, indigenous rights, migration, or social protection, yet they often face limited resources to meet technical indexing requirements. Their value lies partly in multilingual communication, open access, and responsiveness to local problems. When committees equate top-quartile placement with quality, authors are pushed toward generalist or international outlets, while regional journals lose the submissions and reviewers needed to maintain quality. This creates a circular disadvantage: evaluation criteria weaken the very infrastructures that could support high-quality local scholarship.

Subfield journals face a related problem. Quartiles are computed within categories that may be broad, unstable, or poorly matched to specialized communities. A small methods journal, a niche area journal, or a regional public health journal may be vital for cumulative debate but remain outside Q1 because of category size, citation density, or language. In that sense, quartile regimes do not simply rank journals; they reorganize the ecology of scholarly communication.

7. Authorship, Integrity, and Illustrative Vignettes

Integrity risks should be discussed carefully. Quartile regimes do not mechanically produce misconduct, and isolated cases cannot establish prevalence. The relevant claim is narrower: high-stakes publication incentives can interact with weak oversight, cash bonuses, low salaries, intense career competition, and opaque contribution practices to create opportunities for gaming. The international literature on paper mills and authorship markets shows that fabricated manuscripts, sold authorship slots, and abnormal collaboration networks are real problems in highly metricized environments (Byrne & Christopher, 2020; Abalkina, 2023; Parker et al., 2024; Porter & McIntosh, 2024).

Peru provides an illustrative case because the incentive channel is unusually direct. Investigative reports described professors paying to appear as co-authors on manuscripts produced by third parties, with university bonuses linked to indexed publications (RPP Noticias, 2023). A subsequent peer-reviewed analysis characterized the Peruvian market as involving the sale of authorship and connected it to institutional bonus policies that reward high-quartile journals (Alhuay-Quispe & Yance-Yupari, 2025). The example should not be generalized to all Peruvian universities or to Latin America as a whole. It illustrates a boundary condition: when financial rewards are tied closely to quartile-indexed outputs and contribution verification is weak, authorship markets can become attractive.

Spain offers a different type of vignette. Rafael Luque became widely discussed because of extreme publication rates and multiple institutional affiliations. In 2023, El País reported that he had been suspended without pay for thirteen years by the University of Córdoba after disputes over foreign affiliations and employment obligations (Ansede, 2023). In 2025, the same newspaper reported that eleven studies by Luque had been retracted for fraudulent practices and that integrity-monitoring tools flagged further high-risk publications (Ansede, 2025). This case is not evidence that Spanish evaluation reforms caused misconduct. It does show how hyper-productivity, affiliation markets, publication counts, and ranking incentives can interact with authorship norms in ways that test the capacity of institutions and journals to verify contributions.

The common thread across the vignettes is not national character or individual pathology. It is the institutional vulnerability created when publication location, quantity, and ranking position become too strongly coupled to money, prestige, and career progression. Responsible assessment therefore requires not only better indicators but also contribution statements, transparent affiliation rules, random audits, proportionate sanctions, and institutional capacity to investigate anomalies.

8. Reform Currents, Trade-Offs, and Implementation Conditions

Reform initiatives in both regions share a central premise: indicators may inform judgment, but they should not replace it. DORA calls for assessing research on its own merits and reducing the use of journal-level metrics in funding, hiring, and promotion (DORA, 2012). The Leiden Manifesto calls for transparency, field sensitivity, verification of data, and the use of indicators as complements to expert assessment (Hicks et al., 2015). The Agreement on Reforming Research Assessment similarly states that assessment should recognize diverse outputs, practices, and activities and should be based primarily on qualitative judgment supported by responsible quantitative indicators (CoARA, 2022).

The institutional details of CoARA require precision. States do not sign the Agreement as countries, and Spain should not be described as a state signatory. Organizations involved in research assessment can sign the Agreement and subsequently join the Coalition. Spain has a CoARA National Chapter, co-chaired by CRUE, CSIC, ISCIII, and ANECA, which engages Spanish research-performing organizations, research funders, evaluation agencies, and associations whether they have signed the Agreement or not (CoARA, 2026; ANECA, 2025). This distinction matters because reform capacity depends on organizational commitments, national coordination, and the practical alignment of criteria across agencies and universities.

In Latin America, FOLEC-CLACSO has articulated a regional reform agenda that emphasizes qualitative evaluation, multilingualism, diamond open access, and the recognition of diverse outputs (FOLEC-CLACSO, 2022). The ALAEC manifesto similarly argues that evaluation systems should value editorial quality, regional infrastructures such as SciELO, RedALyC, and Latindex, and the social relevance of research rather than reduce quality to journal impact or quartile position (ALAEC, 2021; Heredia & Viggiani, 2022). These initiatives connect responsible metrics with bibliodiversity and with the defense of non-commercial, regionally governed scholarly communication.

Reform, however, has trade-offs. Metrics became attractive partly because committees face large volumes of applications, limited time, and the need to control patronage. Removing all quantitative signals without building review capacity can reintroduce opacity, overburden evaluators, and increase inequality between well-resourced and under-resourced institutions. Narrative CVs can also be gamed if evaluators lack clear rubrics. Regional journals can be valued responsibly only if criteria distinguish editorial quality, peer-review rigor, openness, and relevance from local prestige alone. The challenge is therefore not metrics versus judgment, but how to design judgment that is transparent, accountable, and field-sensitive.

Several design principles follow. First, quartiles should be treated as weak contextual signals, not as automatic thresholds. Second, applicants should be asked to select a limited number of contributions and explain originality, rigor, openness, contribution, and use. Third, committees should record reasons in terms of the work itself rather than only the venue. Fourth, contribution statements should be required for multi-author outputs, especially where authorship markets are a risk. Fifth, institutional rewards should be decoupled from direct cash-per-paper bonuses and linked instead to the quality of the dossier as a whole. Sixth, regional indexes, multilingual outputs, open data, software, policy reports, editorial service, peer review, and community engagement should be recognized when they are relevant to the field and mission. Seventh, evaluators should receive training and should be supported by data infrastructures that reduce rather than reproduce indicator misuse.

9. Conclusions

Spain and Latin America show how a simple journal-category signal can become a powerful mechanism of academic governance. Quartiles helped make evaluation more

legible and, in some settings, more externally oriented. They also narrowed scholarly practice, encouraged English-language and internationally indexed venues, disadvantaged some social science and humanities outputs, and created incentives that can interact with authorship and integrity risks.

The corrective is not to abandon all indicators. The corrective is to put indicators back in proportion. Quartiles can help locate a journal within a database category, but they cannot determine the quality of an article, the contribution of an author, or the public value of a research program. Evaluation systems in Spain and Latin America are already moving toward more contextual, qualitative, and plural forms of assessment. Their success will depend on whether they can combine transparency with field sensitivity, comparability with bibliodiversity, and accountability with trust in expert judgment. If evaluation rewards what research contributes and how responsibly it is produced, quartiles can recede to their proper role: background context rather than the center of academic life.

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