

Publication standards

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The journal *Anales del Instituto de Actuarios Españoles* is a scientific and professional publication that aims to serve as a forum for communication and doctrinal debate for members of the actuarial profession. In this way, practising actuaries will have the opportunity not only to find out about issues of relevance to the profession, which will be addressed by other expert actuaries, but also to benefit from the studies carried out by researchers in the financial-actuarial field. In turn, in addition to receiving contributions from other researchers, they will be able to gain a better understanding of the reality they are analysing.

The contents of the printed version of the journal (from 2017 to 2021) are also available in electronic form on the website.

The journal Anales del Instituto de Actuarios Españoles considers that the formal data set out below are mandatory for any type of contribution submitted to the journal. Failure to comply will result in the rejection of the manuscript.

I. SUBMISSION

Articles will be submitted through the journal's OJS management platform (<https://revistas.actuarios.org>).

- Articles should be submitted in OpenOffice or Microsoft Word format.
- The letter of originality can be sent in PDF format.

II. PRESENTATION

With regard to the data, content, structure and style of the originals, authors shall observe the following rules in order to achieve greater efficiency in the editorial management of the papers:

A. LETTER OF ORIGINALITY

Authors shall send this letter in a file titled: originality_ID-submission_first-surname-of-submission_responsible-submitter.

Example: originality_003_johnson

The originality and right of first publication letter must be submitted via the journal's OJS management platform as an additional file (other).

B. ARTICLE

B.1 Name of the file on the platform

The article will be uploaded to the platform in a file titled: article_first-surname-of-responsible_responsible_second-surname-of-responsible (if it is the case, i.e. from Spain, if not, just the surname).

Example: article_garcia_alonso or article_johnson

B.2 Maximum extension

It is recommended that articles should be no longer than 30 pages and between 8,000 and 12,000 words, excluding references and annexes.

B.3 Types of work

The types of papers that can be submitted are **Research studies**.

These are research papers (written in Spanish or English) both scientific and professional in the fields of insurance, social welfare, finance, and any other related to the field of actuarial and financial science.

B.4 Format

The article must comply with the formatting rules indicated in the article template. Verdana 10 font, single spacing. Italics may be used for foreign words, latinisms, etc...

B.5 Título/Title

In both Spanish and English. The title should be informative and concise, should not include acronyms and should not exceed 30 words, including articles, prepositions and conjunctions. It should be in capital letters, bold, Verdana 14, single-spaced and centred.

B.6 Details of the authors

They should be in lower case, Verdana 12 bold, single-spaced and left-spaced. The full name/s, never abbreviated, and the two surnames (if the case) of each of the signatories must be written in full. In order to increase the visibility of the authors' work, authors must be registered in ORCID (www.orcid.org).

Affiliation: This should be written after the full stop followed by the authors' details and should not be marked in bold. The name of the organisation/institution/superior body to which each of the authors belongs must be written (the name of the institution must be written in the language of origin of the institution). The name of the city and country to which the institution belongs should be written after a full stop. Below the details of each author and his/her affiliation, the e-mail address should be added (it is advisable to indicate the institutional e-mail address, avoiding generic ones such as Gmail, Hotmail, Yahoo, etc.) and the ORCID.

Lead or contact author: in the case of several authors, the contact author should be identified by adding "(contact author)" in brackets.

Order of priority of authorship: the order of authorship will be decided by the authors, always giving more relevance to the first and last position of signature. Authors will have to include information about their specific contribution in the article and in the Letter of originality, conflict of interest and assignment of rights of first publication.

B.7 Resumen/Abstract

In both Spanish and English. It must be written in lower case, Verdana 12, single spaced and justified. The text of the abstract, which must contain between 150 and 250 words, must state the objective of the article, as well as the procedures,

methods, methodology or research techniques that allowed the results of the work to be obtained. The general results obtained must also be presented, as well as the general conclusions. Bibliographical references should not be included.

B.8 Palabras clave/Keywords

In both Spanish and English. It is compulsory to write 3-6 key words. They should be written in lower case, Verdana 12, single spaced and justified, separated by semicolons. In order to favour a standardised description of the articles in the publication, we suggest the use, as far as possible but not essential, of terms taken from the [UNESCO Thesaurus](#).

B.9 Headings and sub-headings

They will be numbered using Arabic numerals and will follow a staggered order of blocks, which will respond to the hierarchical relationship in which the author shows the relationship of the contents of the manuscript, with a maximum of three levels. The main heading (1.^{er} level) in bold capital letters, the other headings in lower case and bold and lower case and italics. None of them should have a full stop. Before and after them there will be a blank line.

B.10 Structure

The journal Anales del Instituto de Actuarios Españoles proposes the following structure for accepted articles, as explained below.

1. INTRODUCTION:

It should set out in an up-to-date manner the state of the art in which the research is framed and should reflect the general objectives and the contribution of the research. Sub-headings are allowed.

2. OBJECTIVES:

In this section, the authors must clearly and concisely identify the objectives of the research set out in the article and, where appropriate, the hypotheses or research questions. The corresponding literature review that supports the research to be carried out must be included. Sub-headings are allowed.

3. METHODOLOGY:

This section should outline the participants or sample, methods, techniques, procedures, approaches and models that were considered in obtaining the research results. Sub-headings are allowed.

4. RESULTS:

The results obtained will be presented according to the objectives and/or hypotheses or research questions.

5. DISCUSSION:

How the hypotheses have been tested or the research questions answered and/or the research objectives addressed will be analysed and discussed. Reflect on the relationships, implications and generalities indicated by the results obtained. The results will be compared with similar existing research in the scientific community, without prejudice to what is stated in the introduction, and the methodological aspects of the research presented that can be improved will be reflected. Sub-headings are allowed.

6. CONCLUSIONS

They should be directly related to the objectives of the work and the results obtained; they should involve a set of deductions from the results and the research problem. Conclusions that are not directly related to the research, as well as to the results presented, should be avoided. Sub-headings are allowed

7. ACKNOWLEDGEMENTS

Support, thanks and acknowledgements to the persons or institutions that have sponsored the article may be given at their discretion.

8. REFERENCES:

The APA style (latest edition) will be used for the organisation and writing of the bibliography. All references, whatever their type (book, article, thesis, etc.) should be included in alphabetical order by surname, without distinction. Verdana 10, French indentation 0.5 cm and justified. There must be a blank space between bibliographical references and single line spacing. If the same author has more than one reference, his/her surname(s) should be rewritten, avoiding hyphens. It is necessary to underline that the use of references will be evaluated by the reviewers according to:

- The correct citation of the reference, according to the APA style (latest edition).
- The use of current literature appropriate to the research topic, especially in the Introduction and in the Discussion.
- The use of international information sources.

9. APPENDICES/ANNEXES (optional):

Documents whose volume makes their inclusion in the text undesirable, but which are important for its comprehension, will be included. They will therefore be included after the text and the bibliographical references, in a separate section, under this heading and numbered in arabic numerals if there is more than one.

B.11 Names, symbols and nomenclature

Authors should use those that are standardised for each discipline.

B.12 Diagrams, graphs, tables, equations, etc...

They should be numbered consecutively according to type (table, graph, etc.) and inserted in the appropriate place in the body of the article text. If for some reason they cannot be inserted in the appropriate place, it is advisable to refer to the number of the figure, table, etc., within the text (e.g.: see figure 1, see table 2...). Overlapping of information between figures, tables, etc., and the text should be avoided.

Pictures. The following specifications regarding the definition of the images must be taken into account: JPG colour or greyscale of the photographs (halftone). JPG files (colour or greyscale) must be at least 300 pp. The title should be aligned to the left and below the figures and should be clear and concise, followed by the source or origin of the figure, in Verdana 10 font. If the source or origin is the author himself/herself, it should be written "own elaboration".

Graphs. The use of graphs is suggested to reflect trends or relativised data. They should be presented in the simplest format that allows the correct interpretation of the underlying data, avoiding as far as possible the use of three-dimensional graphics, highlights, gloss and other elements that do not add specific value to the interpretation of the data. The title should be aligned to the left and below the figures and should be clear and concise, followed by the source or origin of the figure, in Verdana 10 font. If the source or origin is the author him/herself, the text should read "own production".

Tables. Titles should be aligned to the left and below the figures and should be clear and concise, followed by the source or origin of the figure, in Verdana 10 font. If the source or origin is the author him/herself, the text should read "own elaboration". Redundancy of information between tables, figures and text should be avoided, as well as tables that offer simple information. In these cases, the synthesis of information in as few tables as possible is recommended. In addition, authors are requested to attach these elements in editable formats (Excel, etc.) as additional files, as far as possible, in order to facilitate the final layout of their articles.

B.13 Numbering within the text

Classifications within the text of the article (not headings), if necessary, should be in Arabic numerals. They should not be preceded by a blank space, but are followed by a blank space:

1. First item (Verdana 10, left number position at 0.63 with French indentation, justified, single spacing).
2. Second item (Verdana 10, left number position at 0.63 with French indentation, justified, single spacing).
3. ...

B.14 Footnotes

They should be edited, and if used, they should be numbered consecutively and their text should be footnoted, restricted to the minimum necessary, and in Verdana 8 font. Bibliographical references are not accepted as footnotes.

B.15 How to quote in the text

Indirect or referential quotation in normal text

When paraphrasing or alluding to ideas from another work, the author and the year of the reference work should be placed in brackets. It is recommended to indicate the page if the text from which the quotation is taken is long (Author, Year, p. xxx). If the paragraph includes the surname(s) of the author(s), only the date of the reference should be written in brackets (Year). If the paragraph does not cite the author, then the surname(s) and the date (Author, Year) should be written in brackets. When the reference contains one or two authors, the surname(s) of both authors and the year should be written (Author and Author, Year). If the reference contains more than two authors, only the surname(s) of the first author(s), followed by *et al.* will be written (Author *et al.*, Year).

Direct or verbatim quotation within the normal text (less than 40 words)

The text of the quotation should be opened and closed with Latin inverted commas. If the reference of the cited text has one or two authors, the surname(s) of both authors, the year and the page number(s) should be cited (Author and Author, Year, p. xxx). When the reference has more than two authors, only the surname(s) of the

first author(s) should be used, followed by *et al.*, the year and page number (Author *et al.*, Year, p. xxx).

Direct or verbatim quotation in normal text (more than 40 words)

If the quotation is longer than 40 words, it must be written in a separate paragraph, without inverted commas and indented. At the end of the citation, the reference data should be included following these indications: if the cited text has one or two authors, the surname(s) of both authors, the year and the page number(s) should be cited (Author and Author, Year, p. xxx). When there are more than two authors, only the surname(s) of the first author should be used, followed by *et al.*, the year and page number(s) (Author *et al.*, Year, p. xxx).

B.16 Change in authorship

Applications must be sent to the editor of the journal exclusively by the main author, who must also state:

- The reasons why the author's name should be deleted or added, as well as the final order in which the authors of the manuscript should appear with all their details.
- Written confirmation from the rest of the authors of the manuscript expressing their agreement with the modification of authorship.

Until the change of authorship process is completed, the manuscript will not be published definitively, which may delay the final publication process.

III. EDITORIAL PROCESS

1. Receipt of papers

The journal will carry out an initial editorial assessment consisting of checking the article's suitability to the thematic profile, its interest in terms of the journal's editorial criteria, as well as compliance with the formal presentation requirements demanded in the publication rules. Receipt of the article does not imply its acceptance.

2. Peer review system

One or more external expert reviewers will be assigned to evaluate the article using the simple-blind system. They will use the *online* form for reviewers for their report.

The journal editor will inform the author within 15 days whether the manuscript has been rejected or accepted for peer review.

In the event that the manuscript presents superficial problems of structure and/or form, the editor will send the authors the pertinent suggestions so that they can be corrected before the manuscript is sent to the reviewers. In this case, the author will have a maximum of 20 days to submit the corrected manuscript to the editor. The editor reserves the right to make basic formal modifications, which do not affect the content of the text, in order to speed up the editorial process.

Duration of the manuscript review process: the average time taken by the reviewers of the journal *Anales del Instituto de Actuarios Españoles* is 30 to 40 days. The editor will send the author the review reports received, as well as the recommendations (if any) for modification of the article or, failing that, the decision to reject the manuscript together with the review reports. If necessary, the

manuscript will be sent again to the reviewers to continue the evaluation process until the final rejection or approval decision is reached. In each case, the author will have 20 days to submit the corrected manuscript to the editor together with a justification of the changes introduced, as well as those discrepancies that lead to the non-modification of one or more of the aspects pointed out by the reviewers, if any.

In the event of contradictions between the judgements made by the reviewers, or because the editor deems it necessary, the article will be sent to an additional reviewer.

The journal has a database for internal use that processes and registers the transfer of articles and the set of reviewers. The list of reviewers in a one-year period is published after that. Reviewers receive an annual certificate of participation as reviewers of the journal, irrespective of the number of articles they have reviewed per year.

3. Criteria for selection of reviewers

They are selected according to their area of expertise (which guarantees a value judgement based on expert knowledge of the subject matter).

4. Editorial decision

The criteria for acceptance or rejection of works are as follows:

- Originality of the manuscript.
- Methodology.
- Quality of the results and conclusions, and consistency with the objectives stated in the manuscript.
- Clarity of the language used.
- Compliance with the journal's rules.
- Ethical conduct in accordance with the canons applicable to scientific research.
- Relevance and timeliness of the bibliographical references consulted.

Once the evaluation process has been completed, the editors will decide whether or not to publish the article and will notify the main author of the acceptance or rejection of the article. If the article is rejected, the contact author will be informed of the rejection of the submitted manuscript, attaching the reviewers' reports. In this situation, the authors may express their agreement or disagreement with this opinion, as well as any other opinions or questions they may wish to raise, which will be answered within a maximum period of 15 days.

IV. OPEN ACCESS POLICY

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V. CODE OF ETHICS

The journal *Anales del Instituto de Actuarios Españoles*, through its Code of Ethics, is committed to maintaining the highest ethical standards. For this reason, any party involved in the authorship or submission of manuscripts, as well as in their

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management and subsequent dissemination (whether authors, members of the editorial team or reviewers), will be obliged to comply with its Code of Ethics.