

DECLARAR O NO DECLARAR: LEXICON-GRAMMAR INTERFACES IN SPANISH MOOD SELECTION

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Abstract

Choosing between the Spanish Indicative and Subjunctive remains one of the most persistent obstacles for second-language teaching/acquisition. Drawing on Cognitive Linguistics - specifically Cognitive and Construction Grammar - this article reframes mood selection as a lexicon-driven, prototype-based opposition between declaration and non-declaration. A comprehensive bibliographic review shows that lexical matrices (volition, evaluation, probability, negated assertion) systematically steer speakers toward one mood or the other, revealing a tight interface between vocabulary and morphosyntax. We then analyse *Gramática básica del estudiante de español* (2021) as a concrete instantiation of this usage-based model, highlighting its matrix-centred explanations, schematic visuals, and progressively scaffolded tasks. Strengths, limitations, and avenues for empirical validation are organised into a research agenda that calls for longitudinal classroom trials, corpus studies of learner errors, cross-Romance comparisons, and the development of cognitively oriented digital resources. By replacing rule lists with a single communicative heuristic, the study offers a blueprint for mood instruction that better aligns with both speakers' intuitive grammar and current theoretical insights.

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1 Introduction

The Indicative Subjunctive alternation in Spanish remains one of the most persistent difficulties in instructed acquisition, largely because it is often taught through heterogeneous rule lists that do not generalise well across lexical matrices and communicative contexts. Beyond a purely morphosyntactic view, mood choice can be approached as a lexicon grammar interface phenomenon in which matrix predicates and their constructions steer the speaker's epistemic stance.

Although a substantial body of work addresses mood in L2 and heritage Spanish, pedagogical explanations frequently remain fragmented, and theoretical accounts are not always translated into a single operational heuristic that can be

applied consistently in classroom materials. This creates a gap between usage-based descriptions of mood and the kinds of decision rules learners are offered in instructional settings, particularly with matrix types such as volition, evaluation, probability, and negated assertion.

Against this background, the study addresses the following research questions. RQ1, to what extent can mood selection be modelled as an opposition between declaration and non-declaration that is regulated by major lexical matrices. RQ2, how does a widely used cognitive learning grammar, *Gramática básica del estudiante de español* (2021), instantiate this opposition in its explanations and activities. RQ3, what implications, limitations, and empirical validation pathways follow from treating mood as a lexicon grammar interface phenomenon in instructional contexts.

Anchored in Cognitive Linguistics, specifically Cognitive Grammar and Construction Grammar, the article advances a usage-based account in which lexical matrices steer mood via the prototype opposition declaration vs non-declaration. Methodologically, the study combines a narrative, theory driven review of research on mood in L2 and heritage Spanish with a qualitative materials analysis of *Gramática básica del estudiante de español* (2021) as a concrete classroom instantiation of the proposed model. The article's contribution is threefold. It synthesises evidence supporting a lexicon driven account of mood selection, it formulates a single communicative heuristic that can replace lists of rules, and it outlines a research agenda for empirical validation in instructional settings.

The paper proceeds from a theoretical framework (2) and a conceptual plus materials based methodology (3) to a qualitative analysis of GBE (4), and closes with implications, limitations, and future research (5).

2 Theoretical Framework

In exploring the complex interplay between lexicon and grammar in Spanish mood selection - especially among heritage speakers and ELE/L2 learners - it is essential to anchor the discussion in a multidimensional theoretical scaffold that integrates Cognitive-Grammar insights with pedagogical and descriptive traditions (Bosque & Demonte, 1999; Real Academia Española & Asociación de Academias de la Lengua Española, 2010). Classic functional work on language, such as Halliday's *Explorations in the Functions of Language* (Halliday, 1973) already anticipated that grammatical choices are shaped by speakers' communicative purposes; more recent cognitive accounts confirm that mood alternation is driven by a speaker's stance toward the proposition (López García, 2005; Miquel López, 2019). Empirical studies underscore that this decision is not purely syntactic but is heavily filtered through pragmatics: Bove (2019) shows that speakers calibrate mood according to degrees of epistemic commitment, echoing claims in the *Diccionario de términos clave de ELE* that view "competencia gramatical" as inherently usage-based (AA. VV., 2008).

From a heritage-speaker perspective, Pérez-Cortés documents systematic avoidance of the Subjunctive in obligatory contexts (Pérez-Cortés, 2021a), corroborating findings by Busch (2009) on mood underuse in U.S. classrooms. These patterns dovetail with Lozano and Ruiz Campillo's (1996) call for instructional materials that foreground meaning over form, a view equally embraced in Barroso's (2006) proposal for a "motivating communicative grammar." At the same time, Fuente et al. (2018) reveal that heritage speakers and L2 learners follow distinct developmental paths in relative-clause mood selection, while Archibald and Croteau (2020) demonstrate that context-driven comprehension modulates syntactic realisation - a phenomenon already noted in the Cervantes Institute Plan Curricular (Instituto Cervantes, 2006).

Pedagogically, the lexicon-grammar interface invites materials that make semantic motivation transparent (Dubin & Olshtain, 1986; Baralo, 2006). Fenner and Newby (2000) emphasise authenticity and learner autonomy, principles that align with Gómez Molina's (2004) description of the lexico-semantic sub-competence and Martín Peris's (2004) broader notion of grammatical proficiency. Lieberman (2007) further argues that teachers must move beyond rule lists toward prototype-based explanations, echoing Sastre Ruano's (1997) functional treatment of the Subjunctive for advanced learners.

Theoretical innovation likewise proceeds apace. Contreras Kallens and Christiansen (2022) show that multiword expressions - including those that trigger Subjunctive mood - are stored holistically, supporting Booij and Audring's (2015) and Jackendoff and Audring's (2018) Parallel Architecture, where syntax and lexicon form an interactive network rather than a strict hierarchy. Such a view is consonant with Construction-Grammar accounts that treat mood as a constructional choice modulated by frequency, entrenchment, and pragmatic fit.

Together, these strands outline a comprehensive framework: (i) descriptive depth from traditional grammars (Bosque & Demonte, 1999; RAE & ASALE, 2010), (ii) functional-cognitive explanations of speaker stance (Halliday, 1973; López García 2005), (iii) empirical evidence on heritage-speaker variability and context effects (Busch, 2009; Pérez-Cortés, 2021b; Alba de la Fuente et al., 2018), and (iv) pedagogical blueprints for usage-based materials (Baralo, 2006; Fenner & Newby, 2000). Recognising the dynamic nexus of lexicon, grammar, and pragmatics thus not only refines our theoretical understanding of mood selection but also charts a clear path for future research and instructional design in bilingual contexts.

2.1 Construction Grammar (CxG)

Construction Grammar (CxG) is one of the flagship syntactic models within Cognitive Linguistics and provides the theoretical foundation for the present study. In CxG, all of a speaker's grammatical knowledge is represented in a uniform way. Its core claim is that the basic unit of syntactic organisation is the construction (i.e. a form-meaning pairing of any size) and that these constructions are interconnected in a vast network. The traditional notion of "construction" is thus radically

generalised, yielding a single, coherent format for encoding the whole of grammatical knowledge (Croft, 2007, p. 463). As González-García (2012, p. 250) puts it, the construction becomes “a fundamental unit of linguistic theory and therefore an essential component in the full description and explanation of speakers’ linguistic competence and use.”

2.1.1 Origins and contrast with Generative Grammar

CxG arose when cognitive linguists attempted to analyse idioms, finding that generative accounts could not handle them satisfactorily (Croft & Cruse, 2004, p. 291). Generative Grammar (GG) distributes grammatical knowledge across separate components -syntax, semantics, phonology- linked by interface rules. Highly general rules generate phrases and clauses, while all idiosyncratic information is consigned to the lexicon. Because these rules already handle every structure larger than the word, GG assumes that such structures lack arbitrary properties; only lexical items can be exceptional. Consequently, GG rejects the traditional passive construction, for example, and sees no need for construction-specific rules. CxG represents a decisive departure from this view.

Component-based models stumble over idioms: their behaviour cannot be predicted by the usual syntactic, semantic, or linking rules (Croft & Cruse, 2004, p. 298). After examining idioms in depth, scholars concluded that the most accurate way to capture speakers’ knowledge is in terms of constructions. For instance, Goldberg (2006, p. 9) argues that constructions are universal, occurring in every language. Miller (2011, p. 102) likewise notes that each language possesses a rich inventory of constructions - some characteristic of spontaneous speech, others of written discourse, and still others common to both. These patterns also vary diachronically, with some now archaic and others thoroughly contemporary. Many constructions, however, remain language specific. As Martínez Vázquez (2003, p. 14) points out, native speakers effortlessly decode sentences by drawing on constructional meaning, whereas that same, often highly abstract meaning can become an obstacle for second-language learners.

Put it in other words, the syntactic and semantic properties of schematic idioms (as opposed to frozen substantive idioms) cannot be explained by merely listing them in the lexicon or by invoking broad componential rules; instead, those properties reside in the construction itself. In the attempt to generalise the notion of *construction*, CxG extends it to cover the entire body of grammatical knowledge. Given the sheer variety of constructions, speakers’ syntactic competence is far too rich to be described by general rules plus a list of lexicalised exceptions (Croft & Cruse, 2004, p. 312). Constructions, understood as units of syntactic representation, are not isolated; they belong to families of related patterns - collectively known as the *constructicon*.

In the same vein, we part with two key insights (Miller, 2011, p. 100):

1. Different constructions enable us to perform speech acts, whether spoken or written.
2. Constructions are indispensable for effective communication,

because they underlie the creation of diverse text types.

However, further evidence for *constructions* is (González-García, 2012, p. 265)

1. Constructions capture *systematic correspondences* between syntactic form and semantic/pragmatic interpretation.
2. *Coercion* - resolving a clash between a lexical item's meaning and the construction's meaning - always favours the constructional interpretation.
3. Certain sentences in which verbs take *non-canonical senses* can be understood only by appealing to the construction involved.
4. Speakers' treatment of *nonce words* inside constructions shows that the construction itself predicts overall sentence meaning more strongly than the verb does.

In sum, Construction Grammar offers a unified, usage-based account in which constructions - not isolated rules or lexical items - form the backbone of grammatical knowledge and linguistic performance.

2.1.2 Applied linguistics: implications for the Spanish-speaking world

Over recent decades, linguists have questioned the clause-grammar definition of the subjunctive mood (and, by implication, of the indicative), because we can cite numerous contexts in which the subjunctive does not convey a hypothetical fact - as earlier accounts claimed - such as clauses headed by emotive predicates. It should be noted, however, that not all scholars shared that traditional view.

Equally striking is the fact that hypothetical content may surface in the future or the conditional, both indicative tenses. Thus, living speech diverges from rigid descriptions distilled largely from written data: the canonical values still apply, but as tendencies rather than iron rules. In reality, the Indicative is no more “the mood of fact” than the Subjunctive is “the mood of non-fact.” They are simply two vantage points that allow speakers to adopt different stances when framing a situation, and those stances determine modal choice (Aliaga García, 2019).

Appropriately, Cognitive Grammar holds that every grammatical form possesses a prototypical value which, in combination with lexical, pragmatic, and other grammatical factors, yields varied effects. Speakers select from the options offered by the system, and in languages with a modal opposition, the choice hinges on each mood's intrinsic value. In Spanish, the Indicative is the declarative mood par excellence - its job is to state - whereas the Subjunctive merely mentions and does not commit. Consequently, matrices whose meaning involves attestation (e.g., *es cierto que (it's true that)*; *veo que (I see that)*; *está claro que (it's clear that)*) align with declaration, while other matrices merely introduce a clause to serve a broader purpose.

Hence, Llopis García et al. (2012, p. 97) observe that each mood carries default senses and that “it is the speaker who chooses the elements that best fit their communicative needs”. Faced with the same objective reality, one person may choose a declarative form and another a non-declarative:

- i) *Es obvio que mi marido ronca*

(*It's obvious that my husband snores.*)

versus

ii) *Dudo que mi marido ronque.*

(*I doubt that my husband snores.*)

This is precisely the model advocated by Cognitive Grammar (Langacker, 1987 as cited in Castro et al., 2014), which views language as part of a cognitive system that includes perception, emotion, categorisation, abstraction, and reasoning (Llopis García, 2011, p. 211).

Meaning is therefore the linchpin of Cognitive Grammar: what matters most is *language in use*. The link a speaker forges among form, meaning, and conceptualisation - the cognitive processing of meaning - guides linguistic choice: “as our mental experience evolves, we assign meaning to forms and use them communicatively” (Llopis García, 2011, p. 81). Form is thus dependent on meaning; together they make up a single symbolic unit (Llopis García, 2011, p. 83). Notwithstanding, because every construction occurs in context, we must recognise both its grammatical shape and its usage conditions (Aliaga García, 2019). Choice is seldom arbitrary; speakers intuitively know which system elements let them express their intent. The compositionality principle still applies - components contribute much of a clause’s meaning - yet each form offers a distinct “image” or cognitive perspective.

Closely tied to forms and contexts is prototype theory. Real-world entities are ascribed certain traits, which then become conceptual properties (Aliaga García, 2019). A prototype groups objects by shared features without enumerating every attribute; categorising is grouping, not defining. The prototypical value is the basic one - “the DNA of each grammatical form” (Miquel López, 2019). Mentally, the prototype is a “nuclear concept” (Llopis-García 2011) or cognitive reference point (Ungerer & Schmid, 2006, p. 42). Other meanings are peripheral. Prototype and extensions are linked by metaphorical and metonymic paths, much as polysemy links lexical items (Castro et al., 2014, p. 46).

2.1.3 Heritage Spanish: bridging the gap between L1 and L2 frameworks

According to Montrul (2010a, p. 294), “heritage speakers acquire the family language naturally from birth, just as L1 learners do”. In his studies on the linguistic competence of heritage speakers of Spanish in the USA, he considers Spanish as the L1 of these speakers and English as the L2. This is based on the definition of heritage speakers as those who learn Spanish from early childhood and learn English later on (sequential bilinguals). The concept of strong and weak language is used to indicate the actual competence of speakers in both languages. The use of this terminology therefore excludes speakers with low proficiency in Spanish.

Moreover, in this categorisation, the concept of family language is opposed to that of L1, while at the same time they are compared in terms of their acquisition. On the one hand, the terminology L1 and L2 is not useful when talking about the heritage group of speakers as it is based on assumptions about monolingualism and the possibility of separating L1 and L2 competences (Block, 2003). At the same time,

Montrul and other theoretical linguists understand heritage speakers to have, by definition, good linguistic competence in the so-called source language.

On the other hand, authors in the field of Applied Linguistics such as Montrul (2010) point out and emphasise the similarities in the difficulties of Spanish acquisition-learning between heritage speakers and second language learners. Furthermore, in previous studies, he defines heritage speakers as “bilingual/multilingual speakers who learn the majority language at the same time as the source language to satisfy communicative needs, as opposed to those bilinguals who learn the language in the classroom” (Montrul, 2010, p. 7).

In fact, he also contemplates a broader definition of the concept that includes any speaker with a historical and personal connection to the heritage language, regardless of their linguistic competence (Montrul, 2010). Thus, monolingual learners whose parents or grandparents speak a different language are also considered heritage speakers. However, this definition is not the usual one among Spanish teachers in the USA, who usually refer exclusively in this way to those who have been raised in a language other than English, which is usually reflected in the schools’ educational provision (Brinton, 2008).

Although narrowing the concept so that linguistic competence plays a central role is useful for cognitive research, it can be problematic from the point of view of sociolinguistics, and also for everyday classroom practice. Speakers with a personal and historical relationship to the language, but who have received little input in Spanish at home for various reasons, share the difficulties of L2 speakers who are part of the majority culture. However, the relationship of these learners to the culture of the language of origin and their familiarisation with the language itself, despite their generally low proficiency, cannot be ignored in Spanish classes in which these learners participate alongside L2 speakers.

In line with this viewpoint, Kelleher (2010, p. 1), for his part, differentiates a broad group of users within heritage speakers: “Some are able to speak, read and write in the language of origin; others may only speak or understand when someone else addresses them. Some may not understand the language but are part of a family or community where the language is spoken”.

This definition is much more comprehensive and solves the problem of the other definitions mentioned. Thus, and to address the issue of which Spanish to teach, we will take Carreira’s (2004, p. 21) - similar - definition: “set of types of learners who share the characteristic of stopping linguistic and identity needs related to their family background”. This group will therefore be referred to as heritage learners, and language proficiency will be specified where relevant. The term *heritage speakers* will be used in those cases where we wish to respect the terminology used by the authors of the bibliographical sources studied. Nonetheless, it will be marked in italics in order to point out the role that language proficiency normally plays in classifying this type of learner.

2.2 A usage-based model

In contrast to structuralist and generative frameworks - where a speaker's mental representation of grammar is assumed to be fixed by structural principles - most scholars working in Construction Grammar describe language acquisition, use, and change within a usage-based model. In such a model (Croft & Cruse, 2004, p. 376), the frequency with which particular forms and constructions occur, together with the meanings those forms convey, shapes how grammatical units are represented in the mind.

Construction Grammar, therefore, links grammatical knowledge to the processes that deploy that knowledge and to the relation between a mental representation and the utterances that instantiate it. The link is one of categorisation: speakers categorise both the experiences they wish to communicate and the utterances they use as tokens of known constructions that symbolise those experiences. This categorising relationship is frequency-sensitive: constructions at different levels of schematicity become more or less entrenched according to how often they are used (Croft & Cruse, 2004, p. 419).

Formally, a usage-based model is captured as an activation network: activation corresponds to language use, whereas entrenchment - or decay - reflects the lasting effect of use on mental representation. A central hypothesis within Construction Grammar is that productivity springs from high token frequency (Croft & Cruse, 2004, p. 419). Put differently, the entrenchment of a schematic construction is proportional to the number of discrete instances realised in discourse. These generalisations are stored as schemas rather than as input-to-output rules.

Most schemas are source-oriented and can be modelled with rule-like generalisations. Yet, as Croft and Cruse observe, there are also product-oriented schemas, in both morphology and syntax, that resist rule-based modelling. Moreover, a construction's organisation is sensitive to its relative semantic distance from neighbouring constructions, imposing an additional structure on the taxonomic network of multiply-parented constructions. This organisation can be visualised as semantic maps projected onto conceptual space - space whose basic structure appears largely universal. According to the Semantic-Map Connectivity Hypothesis (Croft & Cruse, 2004, p. 413), each construction must correlate one-to-one with a continuous region of that conceptual space.

Concerning language learning, Construction Grammar maintains that both morphology and syntax are acquired gradually, piecemeal, and inductively:

Constructionists argue that language must be learnable from positive input together with fairly general cognitive abilities, since the diversity and complexity witnessed does not yield to nativist accounts. (Goldberg, 2006, p. 15)

To wit, a usage-based perspective views grammatical knowledge as a dynamic, frequency-shaped network of constructions, continually updated through everyday linguistic experience. This categorisation is essentially based on the language

proficiency of the learners as it is impossible to establish a common set of linguistic characteristics. Their language proficiency will depend on various factors such as the age at which the majority language is introduced into the household, the specific composition of the family (whether both parents speak the source language or only one, whether the learner has siblings and their age, whether there are other family members living in the household, etc.), the linguistic and academic background of the family members, which languages are spoken at home and with whom, etc. (Montrul, 2010a, p. 294).

At a macrolevel, those heritage learners who fall within a narrower definition of the term are characterised by near-native proficiency in oral production and comprehension, although they are deficient in written communication competence (Montrul, 2010b, p. 171), especially about production in the academic domain. On the other hand, learners with low language proficiency often display the same linguistic errors as L2 learners or children learning their LI. However, they exhibit language skills and a predisposition for language learning similar to those of higher proficient heritage learners, as well as greater facility than L2 learners in terms of listening comprehension (Polinsky & Kagan, 2007).

2.3 Concluding remarks on linguistic competence from a CxG outlook

Within the CEFR architecture, linguistic competence is an essential component of communicative competence, articulated into measurable sub-competences. The six-level scale offers a stable solution to the perennial problem of standardisation.

Our principal reservation - echoing Mellado - is that the CEFR treats linguistic competence in isolation from other communicative competences. Its description is largely theoretical and formal, without exploring interactions such as:

1. Semantics-syntax: how do thematic roles shape sentence meaning?
2. Phonology-orthography/orthoepy: does the written code facilitate or hinder pronunciation?

We also question the sharp boundaries among sub-competences. On what basis do we separate lexical from semantic competence? Can one learn a word without its meaning - or vice versa? Such interdependencies, we argue, must be integrated into any comprehensive model of linguistic competence.

Taken together, the strands reviewed - Construction Grammar's form-meaning pairings, usage-based entrenchment, and the CEFR's finely grained sub-competences - sketch a view of grammatical knowledge as both structured and dynamic. Constructions supply the architecture; frequency and experience furnish the wiring; sub-competences pinpoint the skills teachers must nurture. Yet, the Spanish classroom reminds us that these elements rarely operate in isolation: meaning permeates form, prosody shapes orthography, and lexical choice tilts syntactic options. Any pedagogical model that hopes to be truly explanatory must therefore embrace the constant interaction among components rather than treating them as sealed silos.

With this integrative perspective in place, we now turn to a domain where

those interactions are tested to the limit: the alternation between the Indicative and Subjunctive moods in Spanish. The next section explores how a construction-based, usage-sensitive lens can make this notoriously thorny contrast more transparent for both heritage learners and L2 students, offering principled guidance for instruction and assessment.

3 Methodology

3.1 Study design and methodology

This study adopts a conceptual-analytical design that combines a narrative review of the literature with a focused analysis of pedagogical materials. On the one hand, we synthesise peer-reviewed research on Spanish mood, heritage and L2 grammars, and usage-based/Construction-Grammar accounts (roughly 1973-2023), alongside major reference grammars and widely used ELE resources. Our inclusion criterion privileges work that links mood choice to lexical and pragmatic matrices, that examines heritage and L2 Spanish in parallel, or that operationalises usage-based/CxG principles in instruction. On the other hand, we conduct a qualitative materials analysis of *Gramática básica del estudiante de español* (GBE, A1-B2), focusing on its Subjunctive chapter. Here we evaluate how closely GBE's explanations and tasks align with the declaration vs. non-declaration prototype proposed in this article, the transparency of its schematic visuals, the sequencing and scaffolding of form-meaning pairings, and the authenticity of practice activities. The study is non-experimental and proposes a heuristic and a materials-based operationalisation, with empirical validation reserved for future work.

From the viewpoint of selection criteria, GBE (2021) was selected because it meets four criteria. First, it is a recent and widely disseminated reference grammar for learners. Second, it explicitly aligns with a cognitive, meaning centred approach, which makes it a relevant test case for operationalising a prototype-based account. Third, it contains both explanatory sections and practice activities, which allows analysis of how conceptual explanations are translated into instructional guidance. Fourth, it covers the Indicative Subjunctive alternation across several lexical matrices, including volition, evaluation, probability, and negated assertion, enabling comparison across environments.

Concerning the analytical procedure, the analysis followed a transparent, stepwise protocol.

1. *Corpus delimitation within the book*: all units and subsections in GBE (2021) that address the Indicative Subjunctive alternation were identified, including explanatory text, examples, tables, and activities.

2. *Extraction and organisation*: excerpts were extracted and organised by matrix type and constructional environment, using the four lexical matrices that structure the article as an initial coding grid.

3. *Coding against the prototype heuristic*: each excerpt was coded for

whether the explanation or task frames the target clause as a declaration or as non-declaration, and for the linguistic cues used to motivate that framing, for example commitment, stance, polarity, and evidential accessibility.

4. *Cross checking and refinement*: when an excerpt invoked multiple cues or blended explanatory levels, it was coded for the dominant pedagogical rationale and flagged as a mixed case.

5. *Synthesis of patterns*: coded excerpts were compared across matrices to identify recurrent explanatory moves, points of convergence with the declaration vs non declaration prototype, and systematic mismatches where rule lists override the communicative heuristic.

This protocol yields a replicable description of how GBE (2021) conceptualises and teaches mood selection, and it supports the paper's broader objective of formulating testable hypotheses for subsequent empirical validation in classroom and learner data.

3.2 Speaker populations and sampling frame

From an operational distinctions' viewpoint, we distinguish L1 Spanish monolinguals, heritage speakers of Spanish (Spanish acquired naturalistically in the home with subsequent dominance in the majority language), and L2 learners (classroom-taught Spanish), following Valdés (2005), Kelleher (2010), Carreira (2004), and Montrul (2010a, 2010b). This separation is analytical, not essentialist: it tracks input profiles, literacy trajectories, and dominance that are known to shape morphosyntax and mood selection (Polinsky & Kagan, 2007; Perez-Cortés, 2021a, 2021b).

It is subsequently relevant for mood selection as heritage grammars often show near-native oral fluency but uneven morphological marking and variable mood realisation in specific matrices, while L2 grammars show greater reliance on taught/formal registers and task-modality effects (Alba de la Fuente, Cruz Enríquez & Lacroix, 2018; Busch, 2009). These differences are predictable consequences of usage-based exposure and literacy practices, and they bear directly on how the declaration/non-declaration heuristic is acquired, applied, and automatised.

In this vein, let us have a look at some illustrative situations:

- I) Report vs. request with *decir* (early-acquired alternation):
 - *L1 monolingual*: Mi padre *dice que es verdad* (report - Indicative) vs. Mi padre *dice que vaya* (request/command - Subjunctive).
 - *Heritage speaker* (lower literacy): robust alternation in speech, but occasional over-generalisation in writing (**dice que voy* for a request), consistent with Perez-Cortés (2021b) on command–assertion contrasts.
- II) Epistemic negation with *no creer* (variable in authentic input):
 - *L1 monolingual*: default Subjunctive (*No creo que sea verdad*), with contextually licensed Indicative signalling personal endorsement (*No creo que es verdad* = “I actually think it is”) - a contrast often under-taught.
 - *Heritage speaker*: higher rates of Indicative after *no creer* in informal

registers (exposure-driven), aligning with classroom reports in U.S. contexts (Busch, 2009).

III) Specificity in relative clauses (*buscar/necesitar* + N *que...*):

– *L1 monolingual*: Subjunctive for non-specific/reference-seeking (Busco un profesor *que hable* portugués), Indicative for specific/known referent (Conozco a un profesor *que habla...*).

– *L2 learner vs. heritage*: L2s often perform better in written, metalinguistic tasks, while heritage speakers are more accurate orally (task-modality asymmetries; Alba de la Fuente et al. 2018).

We therefore distinguish L1 monolinguals, heritage speakers, and L2 learners as an analytical convenience because input profiles and literacy trajectories are known to affect mood realisation (Polinsky & Kagan, 2007; Montrul, 2010a, 2010b; Perez-Cortés 2021a, 2021b). These distinctions motivate the pedagogical relevance of a matrix-based heuristic, but are not tested empirically in the present design. The implication of these instances for the present study is, henceforth, paramount: keeping L1, heritage, and L2 apart prevents category blur and makes our predictions falsifiable: if mood choice is guided by lexical matrices plus declaration/non-declaration, then (i) all groups should pattern similarly in early, high-frequency alternations (e.g., report vs. request), while (ii) group-specific divergences should surface where literacy and input distribution matter most (e.g., relative-clause specificity; no *creer* alternants). This is the granularity required to translate a cognitive-usage model into empirical hypotheses (Montrul, 2010a, 2010b; Polinsky & Kagan, 2007; Alba de la Fuente et al., 2018).

4 Results and Interpretation from a Qualitative Materials Analysis of *Gramática básica del estudiante del español* (2021)

Because form, meaning, and conceptualisation operate as a single symbolic unit, mood choice is never arbitrary: speakers intuitively select the construction whose prototype best matches their discourse intent, and frequent pairings become entrenched “pre-assembled resources” that guarantee fluency. Pedagogically, this insight underpins the declaration / non-declaration dichotomy adopted in *Gramática básica del estudiante de español* (2021): instead of listing context-bound rules, GBE groups subjunctive contexts into four matrix types - desire, evaluation, probability, and negated assertion - thereby grounding instruction in the sole prototypical meaning “non-declaration” and contrasting it with the indicative’s twin prototypes “assert” and “suppose.” Presented through carefully sequenced, usage-based tasks, this operational definition equips L2 and heritage learners alike to internalise mood selection as a cognitively motivated, communicative choice rather than as an inventory of exceptions.

Accordingly, this section addresses RQ2 through a qualitative materials analysis of *Gramática básica del estudiante de español* (2021). The object of analysis is the pedagogical treatment of the Indicative Subjunctive alternation in the

chapter dedicated to the Subjunctive, including explanatory text, examples, schematic visuals, and practice tasks.

The analysis followed a transparent protocol. First, all subsections in GBE that treat the Indicative Subjunctive contrast were identified and delimited, including expository passages and activities. Second, the extracted segments were organised by the lexical matrix that licenses the embedded clause, using the four matrix types foregrounded by GBE as the initial coding grid, namely desire, evaluation, probability, and negated assertion. Third, each segment was coded for the explanatory rationale offered to learners, specifically whether the embedded proposition is framed as declaration or as non declaration, and which cues are made salient to motivate mood choice, such as stance, commitment, polarity, and the speaker's communicative goal. Fourth, tasks were examined for sequencing and recycling, with attention to how the manual moves from exposition to controlled practice and contextualised production. Finally, patterns were synthesised to determine how consistently the manual operationalises the declaration versus non declaration heuristic across matrices, and where it simplifies or suppresses alternations that are documented in usage.

4.1 Results. Descriptive observations

4.1.1 Macro organisation of the mood system in GBE

GBE organises its chapter on the Subjunctive in two broad movements. The first covers forms, and the second covers communicative functions and usage situations. Within the second movement, the manual does not present the alternation as a list of unrelated rules. Instead, it groups licensing environments into matrix-based clusters that are presented as meaning motivated. Across the chapter, the Subjunctive is consistently associated with non-declaration, while the Indicative is presented through two values, affirm and suppose, that jointly instantiate declaration.

This macro-organisation is repeatedly reinforced through schematic and visual supports. The manual uses diagrams that show the dependency relation between a matrix predicate and the embedded clause, and it visually encodes the idea that the choice of mood is not a morphological afterthought but a consequence of the meaning profile of the matrix environment.

4.1.2 Matrix-based typology of non-declaration

Within noun clause environments, GBE maps Subjunctive selection onto four recurring matrix types. These correspond to desire, evaluation, probability, and negated assertion. The manual states this link explicitly and uses it as an organising device across the chapter.

First, in the domain of wishes and goals, GBE treats volitional and necessity predicates, such as *querer*, *desear*, *necesitar*, as environments where the embedded content is presented as virtual, rather than declared. The manual's visuals present the Indicative as infelicitous in these configurations and frame the Subjunctive as the expected option.

Second, in the domain of questioning information, GBE includes predicates such as *dudar*, *no creer*, and *poder ser*. In these cases, the manual consistently guides the learner toward the Subjunctive and frames the embedded proposition as introduced for an epistemic or evaluative purpose rather than as asserted.

Third, in the domain of evaluation, GBE treats evaluative matrices, such as *es bueno que* and *es lamentable que*, as environments where the embedded proposition is mentioned while the speaker performs an attitudinal act. The manual keeps the focus on the communicative function, and it presents the Subjunctive as the default choice.

Fourth, in the domain of negated assertion, the manual presents negation as a systematic trigger for the Subjunctive when the matrix denies or rejects the embedded proposition. The emphasis again falls on the matrix meaning and the discourse action performed.

That is to say, GBE's practice section offers a range of tasks, and it tends to avoid purely decontextualised drilling. Exercises are typically organised to recycle the same matrix types across increasing levels of complexity. The progression moves from recognition and controlled choice to production within short communicative contexts. This sequencing aligns with the manual's declared intention to present the alternation as a meaning guided decision rather than as memorisation of exceptions.

4.2 Interpretation: how the GBE operationalises the declaration vs. non-declaration heuristic

GBE's descriptive organisation can be interpreted as a direct pedagogical operationalisation of a single heuristic. The manual's presentation corresponds to the view that the Subjunctive is selected when the speaker does not wish to declare, neither to affirm nor to suppose, but rather to introduce the proposition in order to perform another communicative task. This is stated in the manual's own terms through the notion of a virtual idea, and it is formulated explicitly by Alonso Raya et al. (2021, p. 157), who explain that the Subjunctive is used when the speaker does not intend to declare and that it depends on matrices expressing wishes, rejections, possibility, or evaluation. The analysis of GBE shows that this claim is not merely asserted in the exposition, but used as the backbone of the chapter's internal organisation.

Ruiz Campillo (2006) argues that grammatical concepts must be taught operationally, and that the Subjunctive should be anchored in a single core meaning that remains valid across contexts. In the analysed chapter, GBE implements precisely this operational intent by collapsing diverse descriptive environments into a small set of matrix families that instantiate the same macro value, non declaration. As a result, the learner is encouraged to decide mood by identifying the discourse action performed by the matrix, rather than by applying atomised rules.

Over time, form-meaning pairings become entrenched, giving speakers "a vast stock of pre-assembled resources that guarantee communicative fluency" (Castro et al. 2014, p. 51). Aliaga García (2019) likewise holds that modal choice

systematically links communicative function - semantic and pragmatic information - to verb forms. For Llopis García (2011), mood is prototypically defined by a clause's declarative or non-declarative status: the indicative signals declaration and identification; the subjunctive, non-declaration and non-identification. This selection rule, dubbed the law of meaning (Ruiz Campillo, 2006 as cited in Llopis García, 2011, p. 109), becomes operative in discourse. Ultimately, a clause's interpretation depends not on the mood label but on the properties of its elements, which mirror the speaker's stance (Aliaga García, 2019).

Declaration manifests the speaker's mental model of the world: the indicative expresses what the speaker knows, believes, or assumes, thereby signalling commitment (Llopis García, 2011). By contrast, non-declaration links elements whose purpose is not to vouch for the speaker's beliefs: the clause is merely mentioned while the speaker negates, doubts, speculates, evaluates, and so on (Llopis García, 2011). Such clauses overlay additional layers onto reality and are non-declarative in nature. From this prototype, semantic networks arise, accounting for the wealth of descriptive cases (Llopis García, 2011, p. 113).

Critically, form is never divorced from meaning or function; any functional change reflects a shift in conceptualisation and in the speaker's level of involvement (Cuenca & Hilferty, 1999 as cited in Llopis García, 2011, p. 139). Hereunder, the Indicative carries a degree of certainty and commitment, whereas the subjunctive entails mere mention. Matrices that foster doubt, evaluation, emotion, etc., favour the Subjunctive. The Indicative maps onto the speaker's immediate reality, enabling confident declaration (Castro et al., 2014); the Subjunctive suspends commitment, leaving facts "pending" in discourse (Castro et al., 2014).

Thereupon, within our theoretical framework, the Indicative's prototype values are *affirm* and *suppose*, while the Subjunctive's single prototype is *non-declaration*. For teaching purposes, (Alonso et al., 2021; Ruiz-Campillo, 2006; Miquel, 2019), *non-declaration* in noun clauses aligns with four matrix types:

1. desire
2. evaluation
3. probability
4. negation of assertions

Furthermore, the materials analysis also reveals controlled simplifications. For example, when treating *no creer*, GBE guides learners toward the Subjunctive and does not foreground the alternation found in usage. This is interpretable as pedagogical economy, but it also creates a potential gap between the learner's operational rule and the variability of authentic input. Similarly, the treatment of *decir* is reduced to two readings, *statement* versus *request*, and the manual does not systematically extend the same semantic split to other *verba dicendi* that pattern similarly. These simplifications do not undermine the manual's overall coherence, but they delimit the scope of the heuristic as presented to learners. The Subjunctive is therefore governed solely by meaning; these semantic laws always prevail in the speaker's communicative intent.

4.3 Operationalising the declaration heuristic in practice

GBE does not merely list uses and rules: it organises meanings into matrices that, by their semantics, help learners process and internalise content. Here the *declaration / non-declaration* antinomy is foregrounded, treating the subjunctive as everything that is not indicative, and vice versa, each within a communicative context.

In line with this, and with respect to our RQ2, about *how does GBE instantiate the declaration versus non declaration opposition*, the analysis shows that GBE instantiates the opposition by making non declaration the single organising value for the Subjunctive in noun clauses and by mapping it onto four matrix types, desire, evaluation, probability, and negated assertion. It reinforces this mapping through consistent visual schemas and through task sequencing that recycles matrix types across progressively more demanding activities. Alonso Raya et al. (2021, p. 157) and Ruiz Campillo (2006) provide the theoretical rationale that GBE operationalises in practical form.

Moving onwards, in reference to RQ1, *to what extent does a matrix driven account support a prototype based model*, our article calls forth that GBE's internal architecture constitutes an applied confirmation that lexical matrices can be used as the primary access point for mood choice, and that a prototype framed as declaration versus non declaration can be implemented as an operational decision procedure for learners, rather than as an abstract theoretical claim. In this sense, the materials analysis supports RQ1 indirectly by showing that the proposed heuristic is stable enough to organise a full teaching sequence.

Set ahead, RQ3 deals with *implications, limitations, and research agenda*. In step with RQ3, the main implication is that a prototype-based heuristic can be translated into a teachable syllabus when it is anchored in matrix families and reinforced through structured task sequencing, as GBE illustrates. The main limitation, visible in the manual, is the handling of borderline or variable environments, where pedagogical simplification may reduce learners' readiness for authentic variability. A focused research agenda follows directly from these observations. Future empirical work can test whether a declaration versus non declaration syllabus accelerates automatization of the alternation across proficiency bands, and whether targeted noticing tasks for alternations like *no creer* mitigate the gap between simplified instruction and real input, without sacrificing the economy advocated by Ruiz Campillo (2006) and the operational clarity that GBE aims to achieve. Alonso Raya et al. (2021, p. 157) provides a clear baseline formulation that can be operationalised into testable classroom interventions.

Reviewing GBE shows a stable mapping of mood values, the Indicative is split into "affirm" and "suppose", while the Subjunctive is consistently treated as "non declaration". Ruiz Campillo (2006) stresses that *declaración* is broader than *aserción* because it covers both affirmation and supposition, a distinction that helps translate the model into classroom language, but it also requires careful sequencing to make an abstract prototype pedagogically usable (Ruiz Campillo, 2006). GBE therefore frames the core contrast as *declaration* versus *non-declaration* and builds

the chapter from this premise, supported by schematic and visual representations, and then develops the system through matrix-based environments (Alonso et al. 2021, p. 157). In particular, it groups Subjunctive selection into wishes and goals, questioning information, and evaluative matrices, consistently treating the embedded proposition as introduced for a communicative purpose rather than declared, and it adds a focused treatment of *decir* by separating its “state” reading from its “request” reading. The practice sequence reinforces this organisation through progressively more demanding tasks in plausible contexts, while largely avoiding decontextualised drilling. Overall, GBE compresses the alternation into four operative semantic types: (i.) desire, (ii.) evaluation, (iii.) probability, and (iv.) negated assertion, which offers learners a compact decision procedure, but it also simplifies some attested variability, notably by not foregrounding the Indicative option after *no creer*.

To cap it all, the first distinction is that between *declaration* and *non-declaration*. Alonso Raya et al. (2021, p. 157) state that the subjunctive is chosen when the speaker does not wish to declare - neither to *affirm* nor to *suppose* - but merely to convey a “virtual idea.” Moreover, “a verb in the Subjunctive always depends on a matrix that expresses wishes, rejections (of what is said or presupposed), possibility, or evaluations.” GBE opens the chapter with this premise, then details each context of use, supplying examples and explanatory notes. It is worth stressing, however, that the marked mood is the Indicative; the Subjunctive is defined in opposition. In addition, every concept is laid out schematically and visually, ensuring that learners see exactly how each operates in context. After a broad overview of the Subjunctive, the manual proceeds to specify and illustrate each of its usage contexts; the present discussion therefore follows GBE’s sequence, commenting on every linguistic situation it describes.

The first sub-category - wishes and goals - covers verbs of volition and necessity (*querer* - *to want*, *desear* - *to wish*, *necesitar* - *to need*, etc.). GBE links these predicates to meanings that remain virtual rather than declared. Its diagrams show that choosing the Indicative in such settings would be erroneous. From a didactic standpoint, this “virtual” dimension is crucial: a clause headed by a subjunctive verb refers to content the speaker has not yet activated. The action, process, or state in question hovers in a conceptual space and, by itself, asserts nothing about the world. Because the speaker withholds declaration, further details about that situation remain unstated - *Dudo que sea cierto* (*I doubt that's true*) illustrates the point, for the doubt resides in *dudo*, not in *ser*.

The next linguistic subtype requiring the Subjunctive is questioning information, another function grounded in non-declaration. Typical triggers include *dudar* - *to doubt*, *no creer* - *not believing*, and *poder ser* - *can be*. Here, GBE simplifies matters by omitting the well-attested Indicative alternation after *no creer*, thereby ruling out forms such as *no creo que es verdad* (*I don't think that's true*). While the aim is pedagogical economy, students should nonetheless be warned that, in real speech, the Indicative after *no creer* signals that the speaker personally accepts the embedded proposition as true even if the grammatical subject does not.

GBE then turns to *decir* - *to say*, distinguishing its two readings: ‘state’,

which selects the indicative, and ‘request’, which remains virtual and thus calls for the Subjunctive. This treatment could be extended to other *verba dicendi* - *afirmar* - *to affirm*; *declarar* - *to declare* - that behave in the same way. The manual subsequently revisits questioning, but adds evaluating information: any evaluative matrix (*es bueno que* – *it’s good that*, *es lamentable que* – *it’s a pity that*) merely mentions a fact and therefore selects the Subjunctive on semantic grounds.

5 Concluding Remarks

This study addressed the persistent difficulty of Indicative Subjunctive selection in L2 and heritage Spanish by treating mood as a lexicon grammar interface phenomenon. Building on a theory driven review within Cognitive Linguistics, we argued that lexical matrices exert decisive pressure on grammatical choice and that the alternation can be modelled through a single prototype opposition, declaration versus non declaration, from which context specific patterns radiate. In addition, a qualitative materials analysis of *Gramática básica del estudiante de español* (GBE, 2021) showed how this opposition can be implemented pedagogically through matrix based grouping and sequenced practice.

Two implications follow. At the theoretical level, modelling mood as a prototype guided choice helps reconcile lexicon and grammar by linking mood selection to the meaning profile of matrix environments. At the didactic level, presenting mood choice as a stance decision grounded in matrix meaning offers an operational shortcut that can reduce reliance on fragmented rule lists and support coherent instruction across recurrent contexts.

The study’s limitations are straightforward. The argumentation is conceptual and bibliographic, and the materials analysis is based on a single pedagogical artefact, GBE (2021). Consequently, the present findings do not themselves demonstrate learning gains, nor do they cover all mood phenomena beyond the levels and environments foregrounded in the analysed grammar.

Future research should therefore focus on empirical validation and extension. Longitudinal classroom studies can test whether a declaration-centred syllabus improves automatization and retention across proficiency bands, including heritage learner cohorts. Complementary corpus-based research can examine whether learner errors correlate systematically with particular lexical matrices and whether the proposed prototype improves the prediction of mood choice across contexts. Further work may also replicate the materials analysis across additional grammars and extend the model to other Romance languages, in order to assess the typological scope of the declaration versus non-declaration heuristic and its pedagogical transferability.

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