LA COMPRENSIÓN DE LO SOCIAL / *UNDERSTANDING THE SOCIAL*

HERMENÉUTICA E INVESTIGACIÓN CUALITATIVA EN IBEROAMÉRICA

*HERMENEUTICS AND QUALITATIVE RESEARCH IN IBERO-AMERICA**

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RESUMEN: En este ensayo pretendo señalar la experiencia y la práctica de la investigación cualitativa en Iberoamérica. Al comparar el estado del arte de la investigación cualitativa en diferentes países, este manuscrito es un primer esfuerzo por difundir el debate al que nos enfrentamos en nuestras sociedades de habla hispana en el contexto de la globalización de la academia. ¿Cómo se ve la investigación cualitativa iberoamericana a través de la globalización? ¿Cuáles son nuestras principales preocupaciones acerca de los métodos y enfoques? ¿Está la hermenéutica incluida en nuestra agenda? En particular, voy a tomar en cuenta el contexto iberoamericano para señalar un conjunto determinado de obstáculos y desafíos de hacer investigación cualitativa en estos países.

ABSTRACT: In this essay, I aim to draw attention to the experience and practice of qualitative research conducted in Ibero-America. Comparing the state of the art of qualitative research in different countries this paper is a first effort to spread the debate underway in Spanish speaking societies in the context of the globalisation of academia. How does Ibero-American qualitative research look from the globalisation viewpoint? What are our main concerns about methods and approaches? Is hermeneutics included on our agenda? Particularly I will take the Ibero-American context into account to point out a particular set of obstacles and challenges of doing qualitative research in these countries.

1. INTRODUCTION

Qualitative research has changed some of our practices as scientists in the last decade. Even though all of us have been acting and doing research in the way we learnt and embracing or advocating the approaches we prefer to use in the context of the "paradigm war", we must recognize just how far the current discussion on qualitative method has moved on from the debate occurring just 30 years ago, for instance. Recently the dialogue between methods, approaches and methodology have provided relevant reflections on diverse disciplines and the influence of any qualitative tradition is being evaluated or re-valuated in different fields.

Methods, approaches and methodology have been enhanced thanks to such dialogue, but also as a consequence of the opportunity to know and discuss what people are doing in different regions of the world. Knowledge based on different traditions, concepts and theories allow us to be aware of both our unity and diversity. Qualitative research is very rich and charming because of the various legacies and treasures gathered in each country.

There are some very well know national examples which have been broadly discussed around the world, such as in North American (Denzin & Lincoln, 1994). But the story of qualitative research is also formed by other narratives, authors and approaches. To examine the non-Anglo-Saxon "peripheries" in the field of qualitative research is the basic goal of this essay. Presenting ideas regarding national differences and experiences, discussing such diversity and analyzing its unity lead us to explore the conceptual roots of our current practices and to act in a future globalized academia. To compare the current stages of qualitative research worldwide, examples and discussions will be provided about various European countries. I also intend to draw on the experience and practice of qualitative research conducted in Ibero-America (Spain, Portugal, Central and South America, and the countries of the Caribbean). However, the effort could be in vain, because of the lack of sources and data from Portugal, for instance.

Having Spanish as a first language, the idea of Ibero-America is to include Brazil and Portugal even though the native language in both countries is Portuguese, because of the common legacy of living in the New World since the fifteenth century. Most Spanish-speaking colleagues interested in interpretative and qualitative inquiry lives in developing countries and have to deal with specific troubles of getting trained or acquaring funding. Comparing the state of qualitative research in Spain and South America, this essay is a first effort to spread the discussion we are facing in our Spanish-speaking societies in the context of the globalization of academia.

To illustrate some of the methodological issues the qualitative researchers from Ibero-America are dealing with, this paper focuses on using qualitative software. How does Ibero-American qualitative research look when viewed from such "globalization"? What are our main concerns when using qualitative software? What about methods and approaches? Particularly, I will take the Ibero-American context into account to point out a particular set of obstacles and challenges of doing qualitative research in Spanish-speaking countries.

2. QUALITATIVE RESEARCH AND HERMENEUTICS IN A GLOBALIZED WORLD

It is fair to recognize that qualitative research is diverse. It has specific faces in each country. Alasuutari (2004) has called our attention to the Anglo-American dominance in the social sciences and its impacts on the path and practices of qualitative research around the world. He emphasizes two fallacies in the progress narrative associated with some views of the development of science, in general, and to the analysis of phases in qualitative research development. The first is related to how the progress narrative makes it difficult to think about the parallel developments going on in different countries and in different disciplines. The second is the way we see the changes of qualitative research practices as a consequence of the struggle between outdated and new modes of thought where the better, valid and more adequate are always the renew ones.

Qualitative research is particular and varieties because of its roots in national experiences. As Atkinson (2005, 1) summarizes, there is "no question that qualitative research of many varieties has flourished on a global scale over the past twenty years." Even though many experiences are not very well-known due to the absence of discussion on an international scale. There are lots of unknown research that has been published only in the researchers' native language, as Corbin says in the case of Grounded Theory published in Spanish (Cisneros-Puebla, 2004).

2.1 North America

As Alasautari (2004, 601) has commented in his critical view of the globalization of qualitative research "the theories and methodologies formulated from a centre position are more easily heard and seen" than others coming out from the peripheries. Since 1994 when the first edition of the *Handbook of Qualitative Research* was published until the third edition released two years ago, Denzin & Lincoln (2005) book have been very influential on the way of thinking about the origin and development of qualitative research. They provided us with a temporal schema based on

moments to think about qualitative research in North America. The traditional moment (1900-1950) is associated with Malinowsi and the Chicago School urban ethnography. The modernist or second moment (1950-1970) was described by Denzin & Lincoln (:8) as "the golden age of rigorous qualitative analysis". It is related to canonical texts as Becker et al. (1961) and Glaser & Strauss (1967) and it is dominated by rhetoric of positivist and post-positivist discourses. During the "blurred genres" moment –term borrowed from Geertz's books (1973 & 1983)- the naturalistic, post-positivist and constructionist movements gained some room in the discussion. This third moment ranges from 1970 to the second half of the 1980s. The crisis of representation, or the fourth moment, happened in the middle of the 1980s when new models of truth, methods and representation were sought by the studies of George Marcus, Michael Fischer, James Clifford, Victor Turner, Edward Bruner & Clifford Geertz. The post-modern or experimental period (1990-1995) corresponded with the work and practice of new ethnographers such as Carolyn Ellis & Arthur Bochner. Because of the confrontation with qualitative researchers developing social theory based on critical, interpretive, linguistic, feminist and rhetorical research they have dealt with a triple crisis of representation, legitimation and praxis. The sixth moment or post-experimental inquiry period (1995-2000) was a period of great excitement where experiments with new ways of inquiry were the main goal: literary, poetic, autobiographical, multi-voiced, critical performative, and other representations were constructed. The seventh moment (2000-2004) is named "the methodologically contested present" and is the confluence of diverse approaches such as critical theory, feminism, queer theory, performative ethnography, and others which characterize a period of great tension. The eighth moment (2005-) is associated with "Bush science" and evidence-based social movement.

American pragmatism and symbolic interactionist tradition are relevant contributions from this part of the world to the international debate, even though this influence hasn't been comparatively evaluated in different regions. However, it is possible now to compare the American way of thinking about qualitative research to the European case (Knoblauch, Flick and Maeder, 2005a, 2005b; Fikfak, Frane and Garz, 2004 and Flick, Von Kardorff and Steinke, 2004), for instance.

2.2 Germany

In the German case, Mey & Mruck (2007) distinguish six phases in the development of qualitative research: (1) an initial flourishing followed by a decline; (2) (re)invention and meta-theoretical foundations; (3) empirical elaboration; (4) technical and reflexive

elaborations; (5) consolidation and establishment; and (6) internationalizing qualitative research.

The first period is characterized by the influence of hermeneutics and phenomenology. In the specific field of sociology, Dilthey, Simmel, Mannheim, Weber and many others, such as Pierce, Dewey, Thomas and Znaniecki, played a crucial role in the early elaboration of qualitative approaches. Lewin and Stern from the Hamburg Institute had some influence on psychology. In the phase of (re)invention and meta-theoretical foundations, texts by Lazarsfeld, Merton, Glaser and Strauss, Becker and Geer, Mead, Blumer, Cicourel and many others reached a broader audience, especially in sociology. Thanks to the influence of interactionist, phenomenological and hermeneutic approaches, some techniques such as objective hermeneutics (Oevermann) and the narrative interview (Schütze) were developed. The deep-structure hermeneutics approach also appears in this period, led by the Bremen group based on the work of Lorenzer. In the third phase, recognized as empirical elaboration, some other approaches are outlined, including the problem-centred interview and the 'qualitative content analysis', developed by Mayring (2000). This phase is characterized by an interest in empirical research instead of methodological and meta-theoretical debates.

During the fourth phase, German researchers were no longer concerned about data collection; their interest was focused on data analysis. Therefore, the Computer Assisted Qualitative Data Analysis (CAQDAS) Networking Project from the United Kingdom found excellent ideas and software prototypes in Germany to enhance discussions about technology and methodology. AQUAD, ATLAS.ti and WINMax (very well-known now as MAXqda) are some examples of qualitative computing developed in this phase that, as Mey & Mruck state (2007, 142) was developed from the end of the 1980s to the beginning of the 1990s. The consolidation of German qualitative research is associated to the strengthening of some working groups and associations as well as to the appearance of various journals and books. Metaphor and conversation analysis and biographic approaches are relevant in this phase. Finally, the years of German qualitative research internationalization in the 21st Century is seen as a consequence of the development of some traditions as a whole and the permanent effort of projects such as the FQS journal (Mruck, Bergold, Breuer and Legewie, 2000).

It is important to say that Mey & Mruck's cartography, as they like to call their contribution, never mentions Gerhardt's analysis (1988) of qualitative sociology in the Federal Republic of Germany, even though her analysis is illustrative of the presence of Weber,

Schütz, Simmel and Mannheim at the origins of qualitative research. Mey & Mruck's description is similar to Flick's scheme about the trajectory of qualitative research in Germany. Flick (2002, 2005) wrote about six phases of qualitative research in Germany:

(1) Early studies (ending XIX-beginnings XX).

(2) Phase of import (early 1970s).

(3) Beginning of original discussion (late 1970s).

(4) Developing of original methods (1970s-1980s).

(5) Consolidation and procedural questions (late 1980s & 1990s), and

(6) Research practice (2000).

Gerhardt (1988) recognized five divergent positions in the German sociology of those days -narrative interview, objective hermeneutics, life cycle, grounded theory, and constructivism- and two traditions of methodology: sociology of language perspective and the biographical perspective.

Even though the "hegemonic position" of sociology in qualitative research fields is partly a self-construction of sociologists and others, as Mruck, Cisneros and Faux (2005) have outlined when talking about the centers and peripheries of qualitative research that it is relevant to see the important role played by the *Qualitative Sociology* at the end of the 80s in the discussion of international perspectives around qualitative research. Beyond any possible sociological bias in the evaluation of qualitative research, for instance, as in the case of Israeli qualitative researchers, Cohen (1988) has recognized them as peripherical in the context of American and European sociologies. Nowadays we have enough information about the Israeli national experience (Weill, 2005) to know about the absence of an anthropology department in any Israeli university or college, which would traditionally foster qualitative methods, although it is visible in the activity of the Israeli Center for Qualitative Methodologies http://www.bgu.ac.il/ICQM/ . Going back to the current German Sociology case Hitzler (2005) recognized four main perspectives: methods, biographical research, sociology of knowledge and Objective Hermeneutics.

2.3 Mexico

Currently, interest in qualitative methodologies is increasing in Mexico. Not counting the professional associations that gather researchers of this orientation nor the specialized journals dedicated exclusively to qualitative research, Mexican social scientists have been working on these traditions against the mainstream paradigm. From previous decades, cultural anthropology, urban studies, feminist theory and practitioners of community work accumulated experiences that nowadays make the methodological reflection very rich. Just with illustrative purposes it is interesting to compare Mexican case to the New Zealand one because Mast (1988), for example, has based her overview on qualitative research in New Zealand in three substantive areas: cultural studies, feminist studies and community studies.

From diverse fields of knowledge, researchers have started to analyze people's daily experiences, aiming to overcome the gap created by the conventional empirical paradigm between science and common sense. This way, the narrative turn has been enriching the Mexican way of performing social research. It is clear now that qualitative inquiry is a critical, hermeneutical and interpretive analysis of the narratives of everyday people in the real world.

Social sciences as a whole have experienced unequal processes of development both at a national and international level. Keeping in mind the big cultural differences, I could say the history of Mexican qualitative sociology is similar to that which has been described by Kato (1988) for the Japanese case, since in both countries qualitative traditions were assumed to have the same origins based on the analysis of the rich cultural inheritance that had accumulated for centuries. The two were also similar in the debate between Sociology and Marxism in the 60s.

Sociology as a discipline was born in Japan after the Meiji Revolution (1868) and in Mexico before the Revolution of 1910. Regarding this science, the two cases are different at the present time, especially in the relationship with the empirical or quantitative sociology. In Japan its presence is peripheral while in Mexico the quantitative sociology dominates the institutional panorama, marginalizing the interpretive paradigm constituted by comprehensive tradition, symbolic interactionism and ethnomethodology.

Our social psychology is also very recent and could also be compared to Japanese Psychology (Suzuki, 2000). This science dates back to the 80s and the terms of the debate are still being defined between the objectivistic and the interpretive paradigms. The first Department of Psychology was founded in the first half of the 70s, when the Department of Philosophy was separated in the National Autonomous University of Mexico. In those years, psychology was defined in behaviourist backgrounds and social psychology was reduced to laboratory research on basic processes of minimum group. Recently, however, researchers who practice the interpretive paradigm formed by symbolic interactionism, phenomenological and/or constructionist traditions, are gaining ground.

The theoretical homogeneity of the 70s was based on diverse interpretations of Marxism as well as on

the Sociology of Development and in the Theory of Dependence. In the 80s, Mexican sociology was characterized by the crisis of old theories and a frenetic search for possibilities of empirical investigation that are more related to empirical problems. Theoretical pluralism and a set of disenchantment characterized those years.

Although Oomen (1988) saw Indian qualitative sociology as a fostered result of three basic orientations of Indian sociology: traditionist, nationalist and pluralist, he highlighted (:51) the influence of some Latin American social scientist –as Andre Gunder-Frank, Paulo Freire and Ivan Illich, among others- on the Indian qualitative sociologists.

Thinking on a Latin American perspective it could be possible to explore the pertinence of the next periodization of qualitative research in the Spanish-speaking countries belonging to American continent. Undoubtedly there are differences between Panama and Venezuela or between Nicaragua and Mexico but, from my analytical view the development of qualitative research in the region is understandable if we see it as:

(1) Origin of Social Sciences (first half XX century), with some specific features of positivism in each country.

(2) Abstracted empiricism and Marxism (1960s & 1970s), struggling against some dictatorship in the most parts of Central and South America.

(3) Theoretical pluralism (1980s), as a consequence of emergent democracies and some external influences in the epistemological and ontological realms.

(4) The dawn of qualitative research (1990s), a phase of uncritical import of theories, methods and approaches.

(5) Assimilation, use and analysis (2000), with no particular and relevant contributions; and,

(6) Desirable and possible scenarios (XXI Century), with the re-evaluation of some experiences associated by Fals-Borda and Freire, among others.

2.4 Spain

In his goal to provide a pictorial-cartographic representation of the case of qualitative research in Spain, Valles (2005) drew six different stages of qualitative social research in such country. At the beginning of 20th century he found some roots in the social reform and the novel in the works of authors as Pérez Galdós, Baroja, Unamuno, Palacio Valdés or Clarín. The sociological philosophy of Ortega y Gasset (1913-1939) as well as the socioeconomic crisis (1913-1917), the Second Republic (1931-36), and the end of Civil War (1936-39) are the context of the second period which is dominated by the influence of German neo-kantism and phenomenology. The post-Spanish Civil War and exile (1940-1959) outline the next stage. During the fourth period the contribution of Jesús Ibáñez is the main feature. Valles called it "near sociological research roots" and it goes from 1960 to 1975. The "boom: use and abuse?" period (1975-1993) is the fifth one. It represents the process of institutionalization of sociology in a post-dictatorship process. Finally, the specialization and systematization stage (1994- today) depicts the coming-of-age period for qualitative applied research and methodology in the Spaniard social sciences field.

As we can see in the next section, the dialogue between qualitative researchers from Spain and colleagues from other Spanish-speaking countries has been permanent and very rich. Bolívar & Domingo (2007) meticulously review and describe the biographical-narrative research origin, development and variants in the social sciences of Ibero-American countries, showing the reciprocal enhancement that qualitative researchers from both sides of the Atlantic who belong to the Spanish-speaking world have had for decades. It would be interesting to evaluate the English-speaking world to highlight the specific features of British and American qualitative research in the way some authors have done (Henwood & Lang, 2005; Strong, 1988) and compare also to the German case (Flick, 2005).

3. OBSTACLES AND CHALLENGES

Visualizing some perspectives for social qualitative research in Mexico, Cisneros-Puebla (2000) identified eight problem areas to be strengthened in order to develop the traditions associated with the qualitative paradigm. Eight years after, such identification is still valid nor only in Mexico but to the whole Spanish-speaking world. Such areas are political action and empowerment, journals, networks, civic journalism, interdisciplinarity, conceptual heritage, assembly and new topics.

In this final section I would like to add some other problem issues to the practice of qualitative research in the Spanish-speaking worlds I am interested in: Latin-America. In doing so, I wanted remember that Seale, Gobo, Gubrium & Silverman (2004) generated a project to discuss qualitative research practice, a topic relatively neglected in American publications, but they didn't published a "European" book, as they like to say. Next, ideas could be appear very "Latin American" to some audiences but they are inspired by very specific social conditions different to those described by Adam & Podmenik (2005) for Slovenia; Bruni & Gobo (2005) and Corradi (1988) for Italy; Wyka (1988)

and Konecki, Kacperczyk & Marciniak (2005) for Poland; Eberle and Elliker (2005) for Switzerland; Schubotz for Ireland and Eneroth (1988) for Sweden.

What are the main obstacles and challenges to Latin American countries? First is the digital divide and the speed of technological change. Latin American countries are living in a complete technological delay. The illusion of "globalized" internet communication is just that, an illusion. Related to that and particularly connected with the previous discussion on qualitative computing, the trouble of software development, marketing and training appears: there are no Latino American software developers, and getting training is too hard. The third obstacle is the lack of professional fields to apply the social and human disciplines: sociology and social psychology, just to mention a few cases, are barely professional in the public eye, in the society as a whole. In addition, there is a huge need for local, community, national and international networking to enhance qualitative research practice.

Cisneros-Puebla, Faux & Mey (2004) wrote a piece about the concept of interview society. Their agreement about the topic is relevant because of the obvious difference between the social production of each one's knowledge. Characteristics of interviewing in the context of interview society include the following:

· The confessional mode of discourse is a form of entertainment.

· The private is a public commodity.

· The private self is the real self, interviewers have access to this self.

· Certain experiences are more authentic than others.

· People have access to their own experiences.

· First-person narratives are very valuable.

Interviewing is one the basic techniques of data collection. What about that? I would like to call attention to some remarkable and basic dilemmas that Latin American qualitative researchers have to deal with when they decided using any form of qualitative interview as data collection strategy. The dilemmas are: (1) informed consent is not yet an institutionalized interaction between interviewer and interviewee, i.e, there are not a legitimated and legal connections between real persons doing co-research; (2) there is not a clear and rigorous understanding of how the self is produced; (3) personalization is an incomplete and contested topic in real daily life; (4) there is a lack of techniques and methods appropriate to any participant, with the consequent absence of data analysis strategies; (5) there is an urgent necessity for secondary qualitative data archives; (6) future discussion about work and getting out 'inner views' instead of interviews; (7) participants recruitment is always a big issue and there is no ethical regulation on it.

When considering interviews as a research tool, such dilemmas are crucial for undertaking qualitative research in the Spanish-speaking world because, if we decide to compare Spanish qualitative research practice to the American one described by Denzin, we will discover a huge "temporal" distance between our practices. Most of the research in Spanish-speaking world is conducted by means of the structured, semi-structured and/or open-ended objective format. According to Denzin such practices belong to the traditional moment (1900-1950) and to the modernist or second moment (1950-1970). There is not much experience in interviewing from the feminist criticisms of these formats (the third moment is 1970s and 1980s in Denzin's ideas and the forth moment is in the midst of the decade of 1980s). There is no self-ethnographic style or post-experimental writtings in Latin American qualitative research practice (Denzin's periods 5 & 6) and the performative turn (seven moment) doesn't exist in our current practice.

Is it fair to compare national experiences in this way? Perhaps not. As Cisneros-Puebla, Domínguez Figaredo, Faux, Kölbl & Packer (2006) have pointed out, it is urgent that we as qualitative researchers incorporate into our agenda discussions of how epistemological perspectives are constructed and how social conditions can shape qualitative inquiry differently. Gobo (2005) has suggested five scenarios for the future of qualitative research: (a) the major formalization of the methods; (b) the development of data analysis; (c) the marriage between computers and qualitative research; (d) the necessity of qualitative methods in a multicultural society; and (e) the implications for applied research. It is my hope that Spanish-speaking world will participate in such scenarios in providing its contribution.

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