

Methodology of Coyuntural Analysis

Notebook # 1: The Epistemological Review of Coyuntural Analysis

GENERAL PRESENTATION OF THE SERIES

This material that you have in your hands is the product of a practice and reflection of many years of work. As a product of this process, we in SIPRO arrived to this systemization with the contribution of many people and with the valuable collaboration of Enrique Valencia who made the basic text of this edition possible. From his document we try to be loyal to the methodological process he plants in a difficult theme, but essential for those who carry out a labor of education and accompaniment to social processes and the reality of our country.

These materials are aimed at contributing to all of those people from the ngo's, promoters, advisors, students, professionals, educators who accompany processes of popular education and of social organizations, and for those intellectuals who produce coyuntural analysis.

The notebooks we present here are a basic text, a contribution that does not signify the last word over this subject. There is a lot still to be said, proposed, and written over it. For many, the approaches and concepts can be debatable, questionable and anachronistic. We are in agreement over that and that is what it is about: generate a reflection and understanding that begins to find new roads and horizons in this galloping reality.

The content of these notebooks can be used in multiple forms depending on the interest. It can easily be part of an extensive course, used for a more deep and focused discussion on the theme, or it can be used as a tool for consulting. It does exempt its readers from the task of going into depth, questioning, criticizing, connecting, proposing changes and even less so of the challenge of sharing in a more accessible way if the theme is deeply comprehended. This would be the central objective of our proposal.

In the face of the disordered reality in which we live, we see the necessity of stopping to analyze it with the objective of accompanying the historical process of change and be participants of it. That is why in *Servicios Informativos Procesados, A.C.*, we revisit this document and we retransmit it for those actors who want to be an active part of their own history.

We hope that the systemization of these notebooks can be a modest contribution and useful for the best development of the analysis of coyuntura.

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PRESENTATION

As a pedagogical approach we propose that the entire series be divided in two parts. The first three notebooks form the first part that we can denominate Epistemology and Coyuntural Analysis.

Why isolate the epistemological aspect? The principal idea is that if we critically analyze the manner in which we learn and understand when we do coyuntural analysis, it will permit us to advance methodologically and it will help us realize more complete investigations with more precise results and findings.

In this notebook we attempt to establish the relationship between epistemology and methodology, and between epistemological obstacles and methodology. If we investigate the errors and correct findings that emerge when we analyze something, the methodology will advance towards a better understanding of things.

Coyuntural Analysis is a concept that has little by little been finding a space in our society. Here we will briefly discuss this historical process and its practice. Before going into the central theme of this notebook, we also propose a definition of Coyuntural Analysis that will be the guide that will orient and tie together the combination of notebooks.

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HISTORICAL INTRODUCTION

Throughout the 1960s there began to occur a certain increase in the practice of coyuntural analysis. This was expressed in the birth of specialized publications (i.e., journals, reviews, etc.) on the topic;

In the formation of commissions dedicated to these investigations in the political parties or in the social organizations, be they syndicated, rural, urban, ecological, feminist, ngo's, of ecclesiastic communities and others;

In the formation of informative and analytical centers and in the writing of the thesis with the objective of studying a certain special event or happening;

And also in the writing of coyuntural reports of theological centers of study, of human rights centers, religious or ecclesiastic associations.

We do not want to suggest that in those years for the first time in the sociological studies the analysis of coyuntura is realized. These were formally initiated at least in the second half of the previous century.

All we affirm is that in Mexico, in the last two decades and in the current, in the field of social sciences and within the political and social organizations, the concept of coyuntural analysis gained its importance.

This analytical practice began conquering territory in the intellectual field and in the competition for cultural legitimacy.¹

It began to be specialized in this field within the academics as well as the social militants and politicians, a new type of intellectual: the coyuntural analyst.

As generally occurs, following the practice there emerged a systemization of it in which the first methodological articles on coyuntural analysis were born. Pioneer works in this subject were those of Alberto Arroyo and Ignacio Medina (1976) and the special number

¹ See BOURDIEU, 1978: 136, 138 and 163.

of the *Revista Mexicana de Sociología* (1979). Shortly after there was a group of more articles, some of which we refer to here.

Within the journals or publications interested in coyuntural analysis since the beginning of the '60s, some deserve special mention: *Estrategia*, *Punto Critico*, and among those dedicated to theology on liberation, *Christus*. By the '80s there are various publications which include some periodic information on coyuntural study. Moreover, in almost all of Latin America centers of informative systemization and analysis were founded.

The diagnostic that we present here is that the concept of **coyuntura** is so widely used that today it is utilized within the academics, journalists, politicians, social organizations (popular & ecclesiastic), in government dialogue, in any medium of communication, etc..

Because it is widely used, the term is thus easily abused. We often apply it indiscriminately and in the end we do not really know what coyuntura is.

Examples:

1. Through coyuntura we understand whichever social action—on the other hand—only the significant ones like the structural or revolutionary changes.
2. Almost every day there is a discussion of coyuntural changes—or on the other extreme—it has been said that there is only a real coyuntura ever thousand years, as we say.

For those of us who think this way, only when the door is open to revolutionary possibilities is it that we find ourselves faced with real coyuntura: the rest is considered pretensions.

The goal of these notebooks is to offer some tools by which to utilize coyuntural analysis, since we are convinced of its utility and importance. For this reason, these notebooks attempt to be pedagogic. The objective is to present a methodological reflection through the systemization of an analytical and pedagogical practice.

In this reflection we find that the coyuntural investigation is a great medium not just for social knowledge and understanding or for the planning of social political alternatives, but also for discussion and socialization of the supposed social theoretics that the coyunturas analyze.

In studding a certain historical period or a part of the current history, we place upon it our conceptions about the past, about the current society and its future perspectives, the way in which we understand economic, social, political, and cultural relations.

For all these reasons, we propose that coyuntural analysis in addition to being a form of knowledge or a method of discussion and socialization of theoretical conceptions is also a space of epistemological ruptures and creations.

PROPOSED DEFINITION OF COYUNTURAL ANALYSIS

To quickly move forward, we propose a definition of **Coyuntural Analysis**:

We will understand **analysis** as: the real or theoretical construction of the object/thing that we want to study.

We will understand **coyuntura** as: a cut in the actual moment or in the moment of the development of the social totality or structure, from the point of view of the correlation of forces.²

This means that we are going to reconstruct the forces or power that diverse social groups have to accomplish their interests in a defined time.

Examples:

1. If we take the knowledge of the death of Lic. Luis Donaldo Colosio, PRI candidate for president, the situation of the treaty for free trade (NAFTA), the presidential problems, and campaigns and the conflict in Chiapas, that all coincide in the first months of 1994, as well as other relevant knowledge of that time, and we see the strength of the diverse actors involved in those moments, we will be making a cut in the actual moment of that history.
2. If we analyze the force that these diverse interests have, we will be analyzing the correlation of forces. In the case of the armed conflict in Chiapas we can see how the Zapatistas have mobilized a large number of people, thus their arms are not guns etc. but their allies (supporters).

In notebook #5 we will discuss in more detail what the significance of a <<cut in the actual moment of history>> signifies and in Notebook #7 what the <<correlation of forces>> is.

Coyuntural analysis in general refers to the study of the actual moment in which we are living. However, an analysis of coyuntura can also be done on understandings of the past even if they are from many years ago.

The **analysis of coyuntura** implies **two things**:

1. A diagnostic of the correlation of forces in the actual moment of a national social totality. (Although generally it is used for national analysis it can also be used in regional and local analysis as well—of the state, department, region, colony, barrio, sector, canton, etc.).³
2. A diagnostic of actions (and its practice) that are necessary to influence in that correlation. (And within a project that attempts to transform or maintain the method of reproducing a social totality. In other words, the way in which all of society functions today be it just or unjust.

² See RUIZ SAHAGUN, 1984: 301 and ZAMELMAN, 1987b: 27.

³ See LUENGO, 1982: 290-291.

QUESTIONS

1. What do we understand about ANALISIS? Could you give an example?
2. What do we understand about COYUNTURA? Could you give an example?
3. What does a <<cut in the actual moment>> signify? Could you give an example?
4. In what levels or spheres can we do Coyuntural Analysis?
5. Is Coyuntural Analysis only for the <<actual moment>>?
6. What are the two characteristics that the Analysis of Coyuntura implies? Could you explain them in your own words?

THE EPISTEMOLOGICAL REVIEW OF COYUNTURAL ANALYSIS

A. The Basic Questions of the Epistemology

We should not be afraid of the term **EPISTEMOLOGY**. It is easy to understand.

Let us see...

The fundamental question of the **epistemology** in general terms is:

What are those conditions that make possible⁴ the understanding/knowledge in the science?

As we well know, there are many types of **sciences**. For each there is a corresponding epistemology. In other words, a way of understanding the reality of that science.

This signifies that there is an **epistemology** of sociology, of economics, of history, of psychology, of mathematics, of chemistry, of physics, of biology, etc.

The epistemology of the **social sciences** (like history, sociology, psychology, etc.) is brought on by the **rationalization⁵ of the process by which we investigate them.**

In a similar manner there is an **Epistemology of Cultural Analysis!**

To understand something of reality we first make an investigation through various means: we ask, we observe, we experiment, we interview, we verify, we come to conclusions, etc.

Thus the **epistemology** is a **second reflection** that we make, but what is that second reflection?

In elegant words we could say that **epistemology** is:

The critical study of the start or beginnings, hypothesis and results of the diverse sciences, with the end result of determining its logical origin, its value, and objective reach.⁶

This signifies that epistemology consists of making a reflection over/of the beginnings, prejudices, values, ideas, etc. that we use to see, feel and investigate the reality, the way in which we make hypothesis and how we formulate results.

We can understand **HYPOTHESIS** as the provisional supposition of something to get from it a consequence. One can formulate a hypothesis of different types: An interpretive hypothesis (of an actual or past knowledge, prospective hypothesis (what we assume will

⁴ BACHELARD, 1974: 15; BOURDIEU, 1975: 20.

⁵ ARROYO, s/f: 1. GIMENEZ, 1978: 8.

⁶ LUENGO, 1982: 147.

happen in the future). More will be discussed on the subject of hypothesis in Notebook No. 4.

The **basic question** of the person who studies epistemology in the social sciences is:

What is it to know?

But **epistemology** asks for a particular kind of knowledge—**the scientific!** And from a practice: that of the diverse ways or processes that we do to investigate the diverse sciences.

So a **basic and first question** in **epistemology** refers to:

What is Social Science?

We do not just ask this question of the **social sciences**, it extends further:

What are its conditions of possibility?

In the relationship between **subject** (the person) and the real **object** (the thing we want to know) we ask:

What is the investigational process we use so that the **subject** can learn about the **object**?

In other words:

What are the **steps** we take to understand something?

This question can be taken apart in two extremes:

1. From the point of view of the **subject** (the person):

What makes it possible for a person to realize an act of knowledge?

How is it that she can know?

And

2. From the point of view of the **object** (the thing):

What in the object makes it possible for us to know what it is?

How is it that the object can be learned?

Here we are talking about the relationship between:

On the one hand the **concept** (the word that defines something) and **reality** (the things) and on the other hand the cognoscente **subject** (the person that knows) and **object** that can be comprehended and that can be transformed⁷ (the thing that is known).

The previous questions do not just refer to the process of knowing but also to questioning **how valid⁸ are the results.**

That is to say, the **concept** (or the word) that we construct in the process of knowing does correspond to the reality.

Is it a reconstruction (in the mind) adequate to social reality? How do we know?

For that reason, the **epistemology** is used in the different criteria **to verify how real** what we have learned really is:

How do we contrast, with the most precision, the relationship between the concept and the real object?

With what we have seen thus far it would seem that we are left with an image of partial **epistemology**. That is why **epistemology** is not used solely in the conditions that make the scientific process of knowing something possible.

It is also asked about that which stops us from understanding something and that causes us to fall in **errors**.

In this sense, the **epistemology** an analysis for finding what made possible the **errors/wrong findings**.⁹

It is the investigation of errors!

Errors are the school of science, because thanks to errors the sciences advance.

That is why we need a continual **reflexive epistemology** to discover those errors so that we do not finish like the song <<*me tropecé de nuevo y con la misma piedra...*>> (I tripped again and with the same rock...).

If it were not that way, new scientific findings would depend on a good guess or pure genius, of which there are few.¹⁰

This way of understanding the **epistemology** as always tied to the processes of investigation, allows us to understand it as an open critical reflection.

This does not signify that we necessarily have to follow the same small road for everything. In each critically reflexive investigation, the **epistemology** can result in new

⁷ LUENGO, 1982: 103.

⁸ PIAGET, 1979: 15; LUENGO, 1982: 147.

⁹ BOURDIEU, 1975: 84.

¹⁰ BACHELARD, 1974: 287.

findings or additions to those already found. It can also achieve new advances not just of the error, but also of the certain results that have already been verified.

It can inclusively contest or contradict the previous <<advances>> that have not been proved that certain.

Therefore the **epistemology** looks for the **conditions** that make it possible to know something, as well as those that get in the way.

QUESTIONS

1. What do we understand about epistemology?
2. Why is there an epistemology for each science?
3. What is the importance of the epistemology of the sciences?
4. Explain in your own words in what the fundamental question of the epistemology consists?
5. Explain in your own words why the epistemology is a second reflection?
6. Explain in your own words the relationship between subject and object?

B. Relationship Between Epistemology and Methodology:

We can understand **methodology** as: the **strategy** of investigation in which various **techniques** are coordinated to **reach** and **transform** an object of knowledge.

For an **epistemological posture** a **methodology** emerges and for the social sciences a sociological theory.¹¹

In other words, if there is a theory in society it is because there is a social science that has formulated it; if there is a methodology it is because there is an epistemological posture by which to understand reality.

- We have already said **epistemology** is a second reflection...
- From this reflection emerge a series of general conclusions about the **conditions** that made possible the scientific understandings...
- We will use these conditions in all of the investigations we later make as **epistemological presumptions** of the particular methods...
- In this sense we find **epistemology** as the elements prior to a new investigation. And like that successively.

With this posture or response to the fundamental epistemological questions we construct basic **methodological principles**.

The articulated and coherent conjunction of principles and the selection of appropriate techniques to it, will for the **general strategy or methodology**.

That way we take into account the epistemology in the previous presumptions of an investigation and also as an action following it.

We can thus formulate a relational outline between **methodology** and **epistemology**:

EPISTEMELOGICAL PRESUPPOSITIONS-----→
 METHODOLOGICAL CRITERIAS-----→
 METHODOLOGICAL APPLICATION-----→
 EPISTEMELOGICAL CRITIQUE OF THE REALIZED PROCESS.¹²

We will attempt to explain the principle **epistemological presuppositions** that are present in our proposal of **methodology of coyuntural analysis**. Obviously they have emerged out of a second reflection of our methodological practice.

¹¹ LUENGO, 1982: 89 and 147.

¹² LUENGO, 1982: 105 and 148. See the outlines of the investigational process proposed in those that discuss bettering a linear conception.

QUESTIONS

1. What did you understand about METHODOLOGY? Explain it in your own words?
2. Explain in your own words how an epistemology intervenes before and after an investigation?
3. What is the relationship between epistemology and methodology?

C. The Obstacles of Knowledge and of the Methodology

The **epistemological systemization** that diverse sciences have realized signify that in the process of knowing we confront **barriers** and obstructions that cause halts and steps back in the understanding of reality.

They are **epistemological obstacles**.¹³

They are the origin of the errors!

The **Epistemological critique** will be directed especially towards them.

In the historical process of the sciences, knowledge has not been conquered in a linear form or without difficulties. The knowledge and understanding that we have been accomplishing has not been for the simple act of accumulating it. The sciences have been opening a step towards a constant struggle against <<assumptions>>,¹⁴ against the errors that are masked as truths or certainties.

This is what the French epistemologist, Francis Gastón Bachelard, has been demonstrating to us through his concept of **epistemological obstacle**.¹⁵

According to Bachelard <<one knows in contrast to a previous knowledge, destroying knowledge incorrectly acquired>> or <<prejudices>> or knowledge <<already constituted>> and inclusive <<intellectual habits that were useful and healthy>>.

For the historian all action <<poorly interpreted>> is converted into an obstacle for understanding other actions, since it has been broken as false.

Our new scientific attitude implies being attentive to discovering the initial errors and <<knock down the obstacles accumulated by everyday life>>.

Examples:

1. When we say that the <<poor>> are poor because they are lazy, that instead of making marches and rallies with demands they should work more hours and better themselves individually to come out of their misery, without taking account that there are many factors—social, political, economic and cultural—that maintain us in that situation.
2. When we believe that the information that the media (i.e., television, newspapers, radio, etc.) provides <<is that way>> <<that they tell the truth>>, without taking into account the fact that they transmit interests with a deformed reality.

It is to say, we need a <<**rupture**>> between thought and counter thought.

¹³ BACHELARD, 1974: 15; ALTHUSSER, 1979: 23; BOURDIEU, 1975: 27-50; GIMENEZ, 1978: 3; SANCHEZ VASQUEZ, 1973: 148.

¹⁴ KOSIK, 1981: 25-37.

¹⁵ See also: ALTHUSSER, 1979:23; BOURDIEU, 1975: 27-50; GIMENEZ, 1978: 3; SANCHEZ VASQUEZ, 1973: 148.

If we discover the **epistemological obstacles** it will help us to find the modes by which to attack them. For Bachelard it is important to investigate the <<psychology of error, of ignorance and impulsiveness (?)>> that are the fountains of a knowledge incorrectly acquired.

The scientific task will imply finding and being reflexive of the obstacles for knowledge:

What are they? Why do they get in the way of knowledge?

Doing this will permit us to unfold a more critical work. It is not about doing a witch-hunt obsessed against errors or a contest to see who finds them under each rock; it's about learning from the errors and assumptions.

There are **epistemological barriers** in the relation between **cognizant subject** (person which knows) and the **knowable and transformable object** (the thing we want to know and transform) and we can find preconceptions trapped many times in the valorizations not yet criticized or analyzed.

In the process we do to know something there appear <<**roadblocks and confusions**>>. ¹⁶

Another man named, Kosik, distinguishes between <<representations or categories of ordinary thought>> or <<common sense>> and <<conception>>. ¹⁷ Following him, we shall here talk about **preconceptions and conceptions**.

We refer here to the **valorizations** like:

<<immediate adherences to an concrete object, captured as a right, utilized as a value>>; to the search for <<intimate satisfactions>> ¹⁸, not of theoretical reconstruction and real transformation of an object.

These valorizations can be conscious or unconscious and generally emerge in the necessities of daily life and are not theoretically worked. Thus they are, <<not criticized>>.

We propose the following outline of the relationship between **epistemological obstacles** and **methodology**:

- (A) VALORIZATIONS AND PRECONCEPTIONS AS OBSTACLES-----→
- (B) PROCESS OF INVESTIGATION-----→
- (C) ERONEOUS AND CORRECT CONCLUSIONS--→
- (D) CRITICAL EPISTEMOLOGY OF A, B, AND C-----→
- (E) CONCLUSION: DETECTION OF OBSTACLES-----→
- (F) PRECISION OF THE EPISTEMELOGICAL PRESUMPTIONS-----→
- (G) METHODOLOGY.

¹⁶ BACHELARD, 1974: 15-22.

¹⁷ See KOSIK, 1981: 25-37; BOURDIEU, 1975: 28.

¹⁸ BACHELARD, 1974: 282.

The proper critical effort will be in:

1. **Discovering** which are the **preconceptions** and the **valorizations** (moments **D** and **E**) that have turned into an obstacle in the advance of the sciences.
2. With the end result of **concluding** in the **epistemological presumptions** (moment **F**) and
3. be able to **develop** a serious and systematic **methodological process** (moment **G**).

If we want to investigate the **coyuntura** we should find these **barriers** that complicate and impede the concrete analysis in the moment in which we make this investigation.

In Notebook No. 3 we will discuss with more detail the preconceptions and values not criticized that get in the way of making a good **Coyuntural Analysis**.

QUESTIONS

1. Explain in your own words what you understood about EPISTEMELOGICAL OBSTACLE.
2. Give an example of appearances we have of reality that are not true, of knowledge already acquired that we have not yet criticized, of previous judgments that we have not yet stopped to reflect over its validity.
3. Explain in your own words the outline illustrating the relationship between epistemological obstacle and methodology.