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# Pietų Amerikos visuomeninių sąjūdžių tyrimų sociologija ir epistemologija

**Santrauka.** *Straipsnyje siekiama parodyti, kad norint suprasti bei paaiškinti dabartinius visuomeninius protestus bei judėjimus Pietų Amerikoje, būtinas naujas socialinių mokslų požiūris į juos. Taip pat norima pademonstruoti geopolitiškai įtakoto racionalumo logikos trūkumus, vedančius link klaidinančių išvadų. Pirmoje straipsnio dalyje, pradedant 1960-aisiais, apibendrinamas skirtingų visuomeninių judėjimų bei protestų formų socialinis kontekstas. Antroje dalyje pasiūloma skirtingų teorinių požiūrių sintezė, kurie domisi visuomeniniais protestais ir sąjūdžiais. Pabaigoje aptariamos istorinio konteksto ir kolektyvinio veiksmo tyrinėjimų studijų sąsajos dabartinėje Pietų Amerikoje ir bandoma identifikuoti tolimesnes šių studijų kryptis.*

**Pagrindinės sąvokos:** *visuomeninis protestas, kolektyvinis veiksmas, epistemologija, metodologija.*
**Key words:** *social protest, collective action, epistemology, methodology.*

## Sociology and Epistemology in Studies on Social Movements in South America

Social movements and protest are central topics for South American social science. Since 19th century, scientists and social thinkers have elaborated various approaches to understand the relationship between conflict, collective actions and social structure. From Martí, Ingenieros and Mariátegui, to Germani, Florestan Fernandez and González Casanova, the central concern was to make comprehensible the special features of South American social forces. Moreover, from development theory to Marxist approaches, the central issue was social change. Theories of collective action be-

came important to analyse social movements and protests in the early 80s.

The epistemology of social science underwent a great transformation during the last three decades of 20th Century. From the 70s to the 90s the 'received view' was broken apart along with the orthodox consensus in social science, and a more pluralist paradigm of the philosophy of social science emerged. The importance of the relationship between epistemology, sociology and the history of science became visible in this context.

The epistemological task is now understood as an interlacing among history, sociology and philosophy of science. In this sense, the evaluation and analysis of social theories are complex activities that involve the recon-

struction of the social and academic context in which they were built.

The history of natural sciences was developed in two main directions: 1) to explain the internal factors of the constitution of theory as a reconstruction of "moments of experiments", and 2) to show how external features of scientific endeavour impact on the process of exploring the validity of theories.

In the field of social sciences the situation was – and is – very different. In the philosophy of social science, little attention is paid to topics like internal or external constraints on social research. Conversely, social theorists wrote about the influence of the 'historical and social context' on the production of theories. Foucault, Bhaskar, Bourdieu, Habermas, and others, despite their differences, showed how social structures determine social and scientific knowledge. In the South American social sciences the situation is similar: much more work has been done on the history of ideas and/or intellectual history than on understanding the impact of the time-space context on scientific explanations of society. The work of South American sociologists, anthropologists, and political scientists is deficient in the way that the histories of their own academic disciplines are related to concrete socio-historical processes.

One example of this situation is the studies of social movements or collective actions. Although South America has been wholly involved in social and economic changes since at least the 19th century, social scientists have not given an explanation of how scientific knowledge of protests and collective behaviour has been constructed. However, since the 80s, many studies of social movements have been done, and the challenge now is to try to understand the connections between social conditions, the production of theory and the paradigms used by social scientists.

Social phenomena, such as the reconstitution of the labour movement against a background of neo-liberal policies, have produced a change within a specific profile of relations between the state and the working class. Social reality is present in our conceptual reading of social world. Social phenomena mark and involve some epistemic and methodological commitments, such as the decision to take class analysis into consideration in order to explain social conflict.

The delicate and multifaceted relation between social features and analytical approaches is a complex question and it would be very ambitious for this paper to try to give a response. In any case, we can think about it, to attempt to show what kind of agenda we will have in the near future in this social scientific field.

This paper aims to show that changes in social-scientific approaches are needed as a way to explain and understand social protest and movements in the South American context; it also aims to point up the possibilities for getting lost in the logic of a geo-politically centred rationality.

To this end, first, I will summarise the social context of different social movements and protest forms since the 60s. Second, I will present a synthesis of the theoretical perspectives on social protest and movements. Third, I will highlight some epistemological and

methodological issues in studies on collective action. And finally I will explore the connection between the historical context and studies of collective action in South America today, in order to identify a current agenda for such studies, This agenda must be alert to absences, symptoms and messages written with the same South-American focus – which does not pay attention to the shrewdness of academic reason – so as to not be lost in a perpetual search for the Other.

## 1. Historical Context and Conflict Networks

The history of South American social movements can be organised into four periods: 1) since the 60s, the shift from class conflict to popular mobilisation; 2) the emergence of the human rights movement, during the 70s, against the authoritarian process; 3) the sprouting of new social movements in the context of democratic renewal processes in the 80s; and 4) the emergence of the struggle against neo-liberalism.[1]

These stages can be described as a set of conflict networks and forms of collective action. From my point of view, it is necessary to clarify that, since the mid-1970s and up to now, there has been a wide and deep process that involves strong connections between social protest, neo-liberal programmes, and political

and social repression in the majority of South American countries. However, there are also many internal consistencies and particularities, which justify these four distinct periods.

In order to simplify the presentation I take five variables: a) the type of agent which plays the role of central actor in social protests and movements; b) what kind of political regime is in power at the time; c) some of the most important economic features of the period; d) the core type of conflict that the social protest involved; and e) the matrix of claims that the protest was organised around.

### 1.1. 1960-70 From Class to Popular Mobilisation

Since the South American countries started their economic development and social modernisation in the 1950s, several types of conflict have emerged, all related to a new order of class structure. The expansion of the middle class and the growth of the working class marked the beginning of social mobilisation to obtain political and social rights.[2]

The central actor of protest was the working-class movement with grass-roots political organisation and progressive churches. The action of the labour movement (and the other organisations) followed predetermined ideological patterns and 'traditional' forms of expressing their demands through mobilisation

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[1]  Of course these periods are large and broad in conceptualisations; the chronological framework topics related with social structuralisation processes were among the most important in social and economic history in Latin America. In this vein, this paper has no opportunity to discuss the topic. The differences among countries are another element to take into consideration, which we can't consider here either.

[2]  I use here the expression 'the beginning' in a broad sense because social mobilisations to obtain political and social rights could also be seen in the earliest years of the 20th century.

and strikes. The action was performed within the rules of the democratic political regime and 'protected' by a set of laws. In this way, the majority of the agents took for granted that they could change the situation by democratic mechanisms, but others chose violence as a means to effect change.

Revolution was the main objective; social transformation was the vehicle and the power of the people the tool. The Cuban revolution was seen as a model and the popular mobilisation of Chilean people was taken as an example. From the 60s to the 70s the hope for a deep social transformation was in some way the spirit of the time.

Within the economic field there were many phenomena conditioning these actions. Among the most important, we can underline three: 1) The industrialisation and expansion of the internal market (after import substitution), the growth of the commercial and service sector and the appearance of a new kind of capital relationship; 2) the stabilisation of rural-urban migration, implying the building of big cities and a more 'modern' pattern of behaviour especially with regard to family organisation and the labour market; and 3) the consolidation of investments of multinational corporations, which became powerful interest groups (and sources of pressure) over political systems.

During this period the type of conflict could be summarised in two demands: for an increase in wages, and for a redistribution of wealth. The working-class movement fought for better wages and improved working conditions, while grassroots and church organisations pushed for income redistribution. In this context the matrix of claims could be called trade-unionist and class demands.

Along with the emergence of new types of actors and their demands, social movements became wider. The new capitalistic social relations impacted on daily life and social 'categories'. New forms of distinction and differences changed the traditional interaction among social agents. Somehow, popular movements became collective actions beyond the typical practices of class positions; this 'being beyond' makes necessary a redefinition of class-based groups as classically conceived.

### 1.2. 1970-80 Human Rights Movements[3]

Beginning in the 70s and going into the 80s, military coup d'états and authoritarian processes became a common feature of the pattern of domination in Latin American countries (especially in South America). These military regimes eliminated public protests and systematically repressed political activity and the trade unions. Beyond state terrorism, a new kind of social movement grew up: the human rights movement. Together with some grassroots and church organisations, the human rights movement started a struggle for the

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[3]   These two phases, 1970-80 and 1980-90 could be considered as moments of the emergence of a popular movement. I maintain here the difference, underlying the specific and important role played by human-rights movements. From their demands to their symbolic resources and ritual style, they opened a new period of social-movement strategies and goals.

restoration of democratic regimes. The human rights movement opened up new paths, strategies and orientations for collective actions in the region, regardless of ideologies and party-political affiliations of their members.

The main economic features during this time were: 1) the expansion of international financial capital with local-global consequences; 2) the growth of public debt; and 3) the emergence of inflation as a structural problem. On the one hand, the type of conflict was the fight for human rights; on the other, the matrix of demands was defined by the claim for civil/citizenship rights.

Many human rights organisations and movements can be found in the 70s, for example, *Madres de Plaza de Mayo* in Argentina, *Vicaria de la Solidaridad* in Chile, and *Ordem dos Advogados do Brasil* among others. These organisations played an important role in the protest against authoritarian governments. They demanded legal rights and individual freedom. As Moreira Alvez wrote,

> [t]he centrality of the fight to regain the right of habeas corpus was thus due to an understanding that the possibility of arrest without charges, followed by possible torture and even disappearance, was a powerful element in a policy of social control through intimidation and terror. (Moreira Alvez 1989; 289)

### 1.3. 1980–90 New Social Movements

In 1980s, which economists called the 'lost decade', the restoration of democratic regimes began. Many of the reasons that made possible the breakdown of authoritarianism, and the connection between human rights and grass-roots organisations, pushed the formation of the new social movements as central actors of collective actions. As Garretón asserted,

> …[a]t the level of the central SM (social movement), there is a shift from the National Popular Movement towards the Democratic Movement: that is to say, towards a central SM that for the first time is not oriented to global and radical social change but to a change of political regime. (Garretón 1997; 71)

Women, retired people, youths and farmers all took to the streets and became actors of the protest. In order to pursue our interest here, it is important to underline that this is the starting point of a multiplication of ways and means of protest. As García Delgado wrote,

> the social movements and the autonomous popular organizations are constituted by non-political party forms: they are, a) about "quality of life", human rights, justice, ecology, security and "post-material values", and b) there are the survivors connected with basic-need resolutions and responses to the increase of unemployment and social disintegration. (García Delgado 1992; 10)

The main economic features were: 1) the dependency of financial capital (national and international); 2) the growth of public debt, and 3) hyperinflation. The types of conflict concerned preserving social welfare rights and stopping falling salaries. The matrix of claims focused on social and economic popular rights.

It is worth highlighting that the label 'new' social movement is analytically quite unsatisfactory. Despite the emphasised novelty of strategies and demands, in many places and senses, the 'old' struggle remained the same, that is, the struggle for emancipation.[4]

In the 80s South American countries suffered something we could call the second wave of neo-liberal prescriptions, but at that time in democratic context. These 'medical ordinances' undermined the relation between civil society and state and destabilised democratic power. The human-rights struggles became, step-by-step, larger social mobilisations for democratic rights. Since then, human rights have been thought of as political rights.

Castells and Touraine's approaches were often used to explain the relationship between social movements and political issues. As Castells wrote,

> …the analysis of urban struggles must consider social relations in each conjuncture, and, moreover, the emergence of these social movements can only be understood through the study of their articulation as class political relations and to a precise historical situation. (Castells 1978; 146)

### 1.4. 1990–2000 Struggle against the Structural Adjustment Programmes (SAPs)[5]

In the 90s, with the democratic crisis, the new social movements were displaced by a 'new' social protest. Sometimes, as Walton and Ragin explained, '[T]he protests have been called "IMF riots" because they typically are in response to austerity measures recommended by the International Monetary Fund…' (Walton and Ragin 1989; 217). The old patterns of actions were replaced by many different ways of making visible the exclusionary and fragmentary process. Although the democratic regimes were formally maintained, sometimes the applications of neo-liberal programmes implied systematic repression against those who challenged the new liberal order. As Canak asserts:

> the specific set of measures imposed on borrower countries include: 1) devaluation; 2) reduced public spending; 3) elimination of public subsidies; 4) wages restraint; 5) increased interest rates and taxes related to demand curbs; 6) elimination of state-owned or supported enterprises and greater access for foreign investment; 7) reform the protection for local industries, export promotion, and application of new foreign exchange to the debt service. (Canak 1989; 19)

In this context the growth of poverty, the increase of unemployment rates and the elimination of the welfare state were the central economic features.

The impacts of the structural adjustment programs defined the central type of conflict, but at the time one of the wider challenges for a democratic way of life appeared: the redefinition of identities and the reduction of uncertainty. In this way, the matrix of demands shifted to recognition and economic rights. The temporary barricading of roads, 'beating pots and pans' demonstrations, silent marches, and many other forms of protest were the

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[4]  A history of the practical, conceptual and philosophical meaning of the word 'emancipation' in a Latin American context may be one of most important topics that should be studied.

[5]  SAP = Structural Adjustment Programmes. It is worth highlighting that these types of programmes were imposed from the last years of 70s, but the periods chosen here are used to understand the different types of collective action. Besides, its more direct consequences are evident in this period: a conservative revolution that could be named as 'Revolution of inequality'.

means used by unemployed, newly poor and otherwise 'ejected' and invisible people.

The third wave of neo-liberal prescriptions involved strong changes in the configuration of collective appeals. Those who lost their jobs no longer had the former identifications that made sense of their collective identity. They could no longer be recognized as 'fellow workers', or have other symbolic marks of collective inclusion.

Liberal policies involved the emergence of a fragmentary and exclusionary society, and with this process the consolidation of social uncertainty became more powerful. In the 90s in the South American context the other side of the 'central' risk society appeared: the risk of disappearing as visible agents. In this way agents' struggles became a symbolic fight for visibility. The task of social protest was to reduce uncertainty in the economic and social sense.

In this synthesis of contexts and positions in terms of the collective actions in the region, social movements and protests are useful in

Table 1. **Collective action since the 1960s**

| Time | Agents | Political Regime | Economic Features | Type of Conflict | Matrix of Demands |
|------|--------|------------------|-------------------|------------------|-------------------|
| 1960–70 | • LABOUR MOVEMENTS<br>• Grassroots political organisations<br>• Progressive churches | Democratic | • Expansion of internal markets<br>• Country-city migrations<br>• Consolidation of multinational companies | • Wage levels<br>• Redistribution of wealth | • Trade unions and class demands |
| 1970–80 | • HUMAN RIGHTS MOV<br>• Grassroots political organisations<br>• Progressive Churches | Authoritarian | • Internationalisation of financial capital<br>• Growth of public debt<br>• Inflation | • Human rights | • Citizenship rights |
| 1980–90 | • NEW SOCIAL MOVEMENTS<br>• Human-rights movements<br>• Grassroots organisations | Democratic | • Dependency on Financial capital<br>• Growth of public debt<br>• Hyperinflation | • Social welfare<br>• Fall in wages | • Social and economic popular Rights |
| 1990–2000 | • NEW SOCIAL MOVEMENTS<br>• Trade unions<br>• Indigenous movements<br>• Street riots | Democratic | • Growth of poverty and rates of unemployment.<br>• End of the welfare state | • Impact of SAPs<br>• Identity and uncertainty | • Recognition and economic rights |

drawing a picture of the social world, its conflicts and re-constructions. The social sciences have already debated this conflict. In the following section we will introduce the main arguments.

## 2. Theoretical Perspectives and Social Science Approaches

Social changes and revolution have been common topics among social thinkers and social scientists since the 19th century in South America. How do we change colonial dependency? What type of societies would we like to build? Who is to carry out these structural reorganisations? These are some of the questions that social scientists have been asking for years. In this section, I will schematise the central characteristics of social movements and protest in the main South American social theories. The objective is to make evident the central cores of these narrations which, beyond their intentions, are indebted to the Academic Institution.

In the 50s, when development theory was born in the context of CEPAL as an academic institution, the central target of the founders was to build a framework to analyse the economic and social situation of Latin America. Raúl Prebisch and others pointed out that the countries of the region have been involved in a centre and periphery structure in relation to developed countries. They described the mechanism of deterioration in terms of trade and the differential rates of labour productivity, among others, as the sources of underdevelopment. State planning, industrialisation and the reorganisation of the working class

were the way to overcome underdevelopment. In this context collective actions were identified as cooperation and modernisation. Community organisation for development and the modernisation of the planning capacity were viewed as two of the paths for organising the 'development-oriented state'.

Until the 60s, under different terms such as modernisation theory and marginalisation theory, social change and collective action were seen being in a direct relation with the development process.

Dependency theory evolved from the CEPAL school; this underlined the reciprocal connection between development and underdevelopment. Cardoso, Faletto and others (in different ways) argued that one country is under-developed because another is developed. From a Marxist and structuralist point of view, dependentists asserted that this central analytical point made possible a political shift in social scientists' analyses. The class struggle and the relationships between national and external factors constituted a particular domination pattern, and this pattern was the centre of analysis.

Collective actions became class actions, and this was understood as a working class movement. Dependency theory identified the organisation and strategies of the trade unions and 'owner' organisations as the key to explaining the domination pattern.

In the 70s, most South American countries suffered some kind of authoritarian government. When the authoritarian process started, the academic conditions at the universities changed drastically and there was a shift in the

problems discussed by the academic community. In the theories for democratic recovery, collective actions have a place as political actions.[6] In this context the traditional working class lost its centrality and the popular and new social movements' concerns emerged.[7]

Since the 80s, the traditions of European and United States social movements became the sources for explaining collective action in democratic reconstruction. The two principal frameworks were: Resource Mobilisation Theory (RMT) and Collective Identity Theory (CIT). Much particular research has been done in this respect, focused especially on the human rights and popular movements.

The approaches for democratic reconstruction were followed by the application of collective action theories to social protest. The challenges of new democratic regimes produced several demands from civil society, and involved the emergence of 'new' types of social protest. When the consolidation of democratic regimes was more or less complete, the demands for economic and social rights became important. At this time the application of structural adjustment programs (SAPs) started, and with this, there appeared a number of social problems. The growth of unemployment rates, the increased gap between poor and rich people, the amazing growth of poverty and the

elimination of welfare programmes were only some of the consequences of SAPs.

Neo-liberalism imposed a new focus for discussing social protests: the social tolerance to adjustment. More and more social protest had as its target local and particular problems, and it is perceived as spontaneous and fragmented mass expression, but other understandings came from the new social movement's tradition, in which the protest must be seen as culturally-embedded messages.

Since 1994, when the Zapatistas appeared, a new type of social protest against neo-liberalism started. As Veltmeyer and Petras argued,

> [t]he insurrection of indigenous peasants in Chiapas on the first of January in 1994 has had a profound impact. Not only did it put an end to the ruling class's – and party's – illusion of social peace and stability…, but it had a significant impact on what we could term the sociology of social movements. (Veltmeyer and Petras 2000; 99)

Social movements and social protests, more and more, must be understood in the regional and global context. From this perspective there appear some theoretical challenges such as the redefinition of internationalism, the 'resurgence' of large organisations and the working-class movement, the autonomy and decentralisation of the protesters, and the relationship between national and global conflict.

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[6]   During this period one of the most hidden theoretical premises was the inner explosion of social-class concepts but, from my point of view, in retrospect this premise must be revised.

[7]   At this time there began a discussion about mass movements and popular movements. For instance, the national mass movements, as in Touraine's account, have three characteristic demands: class goals, anti-colonialism and national-integration (Touraine 1989). Furthermore, the development of the concept of *lo popular* has its own history and involves a long discussion, but during this period the conceptualisation of 'the popular' became a central topic of collective action.

In order to connect social and theoretical contexts, it is possible to identify a group of key relations. To explore these relations I use six variables: Time/Agents, Type of Conflict, Matrix of Claims, Theories, Concepts and Traditions/Discourses. Table 2 shows some of the key relations between historical context and theoretical practices.

What do we see in Table 2? What type of relationship do we find between theories and context? Many answers may be given. Among the most important we can identify four:

1. The asynchronicity between theories and context in the 60s and 70s. That is to say, there was a gap between academic theories and their practical utilisation.

Table 2.  **Collective action and theoretical traditions**

| Time/Agents | Type of Conflict | Matrix of Claims | Theories | Concepts | Traditions/ Discourses |
|---|---|---|---|---|---|
| 1960-70 • LABOUR MOV. • Grassroots political org. • Progressive Churches | Wage levels Redistribution of wealth | Trade unions and class demands | Development (modernisation) | Community org. Change and modern agents | Functionalism structuralism |
| 1970- 80 • HUMAN RIGHTS MOV. • Grassroots political org. • Progressive churches | Human rights | Citizenship rights | Dependency (imperialism) | Social force Social class | Marxism and structuralism |
| 1980-90 • NEW SOCIAL MOV. • Human-rights movements • Grassroots organisations | Social welfare Fall of wages | Social and economic popular rights | Theories about authoritarian processes | Political agents Collective practices | Historical and political approaches and theories of collective actions |
| 1990-2000 • NEW SOCIAL MOV. • Trade unions • Indigenous movements • Street riots | Impact of SAPs Identity and uncertainty | Recognition and economic rights | 'New' theories of collective actions. RMT and CIT | Collective organisation and rational actions or collective identity and cultural features | 'US-oriented' and 'European- oriented' |

2. From the 60s to the 80s, theory was understood as an answer to the social situation, while from the 80s to 2000, theory has been seen as a scientific concern.

3. Given this, it is possible to see the shift from political milieu to scientific visions.

4. We can see the shift from original South American production to reproductive practice of inquiry, too.

Theory and praxis, science and *polis*, commitment and neutrality, are dualities that emerge from the history of studies on collective action in the South American context.

## 3. Studying Collective Action: Epistemological and Methodological Issues

The historical concern about social protest is a classic topic of social history. South American historians considered E.P. Thompson and Perry Anderson, among others, as the initiators of studies of social protest. There were deep connections between historical approaches and a working class point of view, related for instance to popular struggles for citizenship. Foweraker and Landman argued that,

> Traditionally, these collective struggles have been understood to express class conflict, and especially the rise of working class. The English school of social history…has shown that poor and working people began early to speak the language of rights… (Foweraker And Landman 1997; 1)

Additionally, many historians take into account such sociologists as Tarrow, Tilly, McCa-

rthy, Saïd, and others as their theoretical sources. In this way Susan Eckstein, after examining the influence of modernisation, dependency and rational choice theories on the understanding of social movements, argued that, '…resource-mobilization theory (RMT) is perhaps the most well formulated non-Marxist school of thought that explains social movements at the organizational, not individual, level' (Eckstein 1989; 6). Also Eckstein noted the following characteristics of RMT: a) grievances are endemic to social structure; b) grievances do not explain social movements by themselves; c) RMT sees movements' actions as rational (cost-rewards); d) social movements depend on resources, group organisation and opportunities.

This poses some epistemological and methodological problems: 1) the quality and scope of historical 'documents' as tools to perceive social protest; and 2) the revival of the discussion about the disciplinary status of sociological history.[8]

From a political perspective the main authors considered were Tilly and Tarrow. Political sociology is – and always was – an interdisciplinary endeavour where sociology and political science converge, a particular feature being the incorporation of comparative research coming from a political science milieu.

Comparative cross-national and cultural research became more or less problematic, because of the lack of information and the relative 'novelty' of these affairs. From this analytical

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8　I don't think that the epistemological problems have to do with 'inclusion' within a discipline. I would like to suggest that a multidisciplinary account of collective action comes from the appearance of some theoretical disciplinary constraints.

frame of reference, such topics as revolution, political opposition and political association took an important role in capturing the meaning of social protest.

In addition to political scientists, sociologists and historians used cultural and sociological approaches alongside the disciplinary connections. In challenging RMT and classical Marxist[9] views the 'culturalists' used and highlighted notions such as identity (personal and collective), audience and day-to-day networks, as central concepts. The authors most utilised by cultural analysts were Melucci, Snow and Klandermans, among others.

In the South American context this analytical starting point was used to do research on social movements and social protest. In a careful reading of the work of García Delgado (1992), Jelin (1987) and Fernández (1991), the suggestion is that the analysis of 'new' social movements involves: a) the exigencies of shifting theoretical discourses for understanding the differences and novelty of the new collective actions; b) the rupture with class analysis; and c) the reception of RTM and CIT as conceptual tools for gaining a more comprehensive understanding of new types of collective action. There were some problems translating concepts originally created to understand new social movements (especially in Europe) in order to explain social protest in South America. In short, we have:

1.  Two main analytical sources to explain social movements and protest, on one hand resource-mobilisation theory, and on other hand cultural and identity theories.

2.  Disciplinary (or epistemological) problems relating to, for instance, sociological history and political sociology.

3.  Research (or methodological) problems also appear as a result of the displacement from social movements towards social-protest accounts.

4.  Finally, another feature of discussion concerning the impact of RMT and CIT on South American social research is the qualitative-quantitative dispute.

Another core topic in any theoretical account is the use of metaphors and their implicit world image. At this point we need some conceptual precision. All theory involves a world image as implicit ontology. A world image has the following components:

•   An agent notion that implies a vision of the subject and how the self-production and reproduction of these subjects takes place;

•   A view of which resources are brought into play by agents to create differences and hierarchy, like power, richness and language.

•   Also, the setting up of other subjects/objects, with human agents sharing a horizon-environment;

•   A particular space-time vision.

A world image is a way to appraise the implicit organisation and perception that agents, processes and resources have about a theory. The

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[9]   I do not focus here on Marxist approaches in order to simplify the argumentation, but it is necessary to emphasise that there are many research groups working within this tradition. I think that their multiplicity and valuable contribution to collective action studies demands a special paper.

operative mechanism of the world image is the utilisation of metaphor. Metaphorical thinking allows displacement from one known territory to another unknown territory. Metaphor is a cognitive resource to achieve knowledge about something by meaning displacement.

Theories of social movements are not exceptions when it comes to the use of a world image through metaphorical mechanisms. With these simple, but necessary, conceptual clarifications, we can come back to our main concern.

To try to explain all of the metaphorical components of social movement theories is too ambitious for this paper. However, I will summarise the central components of the world images of the two main approaches used to study social protest movements in South America: RMT and CIT.

From the point of view schematised, the two main world images may be described in the following way:

1. The studies based on RMT assume an individual actor with rational behaviour, and a collective actor became possible through the sum of individuals' actions. The most important resource of differentiation is the capability to manage power and wealth within a structural position, which involves a rational and adaptive horizon/environment in the context of the 'functional' time/space conception.

2. Studies founded on CIT imply the use of decentred images of subjects in connection with a personal-identity account about the self, and a constructionist and cognitive approach to consciousness. Capacities of managed information and decoding social signals and messages are the nuclear resource of the differentiation between human beings. This image involves a comprehensive and culturally constructed perception of the horizon/environment. Finally, a non-teleological and spontaneous vision of time and a phenomenological space overview compose this world image.

Many reasonable questions may be formulated here: are RMT and CIT frameworks in

Table 3. **Images of the world of collective action theories**

| Components of Theories | Resource Mobilisation | Collective Identity |
|---|---|---|
| **Agent Notion** | Sum of individuals/rational behaviour/actors | Decentred subject/personal/identity/ constructive and cognitive consciousness |
| **Resource of Differentiation** | Power and richness within structural position, organisational resource | Capacity to manage information/ decode message performance |
| **Horizon/ environment** | Rational and adaptive | Comprehensive and culturally constructed environment |
| **Time/space** | Functional | Non-teleological, spontaneous time and phenomenal space |

the new South American context satisfactory when it comes to analysing collective action? Do their ontological commitments allow adequate conceptual complexity in understanding the particular situations of South America? What are the risks of an innocent use of a different approach from the South-American one? Where are the borders between empirical enquires, particular phenomenal fields and performative action?

Again, these and other questions drive our search for historical and conceptual relationships.

## 4. History, Context and Theory in Collective Action Studies

In the context of the above explorations, several questions may be formulated. One of the most interesting aspects of studies of collective action from a philosophical viewpoint is that these studies are always a kind of ex-post-facto survey. Collective actions habitually are actions of the past, and we need instruments to understand these types of practices from the present. In one way or another, studies of collective action are dependent on history.

South American social movements and protests are, usually, historical facts that we need to understand in a special social context. The analytical tools created for this purpose are also historically conditioned. Social practices are partly constructed by social scientists and their theoretical tools have a historical dependence on a specific scientific community. From this perspective, theories, social facts and scientific communities are deeply connected

with their history and with how this history is elaborated.

The world image and metaphorical mechanisms adopted by theories are historically determined. The scientist has a source for his metaphors in a life-world shared with others as human beings in day-to-day life. Historical and contextual situations are imprinted on this daily life and place limits on the metaphorical fields.

In short, in studies of collective action, we have two central questions about history:
a) What kind of historical approaches will be used to understand their 'social context?'
b) What type of history of the scientific community have the theoretical tools built to do research about collective actions?

Each of these questions needs an exploratory investigation to make possible a deeper understanding of collective action, especially in the South American context. Various possibilities emerge from this point and we find different responses from different scholars to our two main problems.

Tilly (2000) wrote about cultural ecology and creative interaction as two good answers to the question of how historical social interactions impinge on actions. In another vein John Hall (1999) provides an analytical account of the ideal types of social-historical research, through his proposal about cultures of inquiry. Alexander and Bourdieu constructed their own responses: traditional analysis in the former, and reflexive sociology in the latter.

I would like to propose three questions and some challenges as a draft of a future agenda for collective action studies in South America.

The questions are related to how we might rebuild our practices of inquiry. In this way I establish three levels of questions: epistemological, methodological and theoretical. The challenges come from what we need to study. For this task, I would emphasise the core role of understanding collective action from its absences, symptoms and messages.

From an epistemological viewpoint the question is: how can we find an adequate place and weight for history in our practice and theories and in a reflexive revision of our knowledge of collective action? At the methodological level the question is: how can we build a satisfactory sociological document with our partners and subjects of research about collective action? From a theoretical viewpoint the question is: what is the (social and academic) meaning of asking about collective action in South America in the global protest context? One of the great challenges is understanding how people from street struggles give rise to social changes. The agents' day-to-day resistance activities in confronting hegemonic power have an important place in explaining the social constitution. Conflict is not only a disruptive social fact; it is also part of the whole structure of society. The riots, silent marches and newer kinds of (aesthetic) protest show and tell us about identity, differences and fragmentation in society. We have the challenge of looking carefully at the possible interlacing between the phenomenological aspects and structural features of social protest.

In order to interpret the meaning of collective action we need to pay attention to three components of social protest and movements:

1) We need to explore collective actions as expressions of absences that point up the moments when the social system could not be sutured, when society has no cement for linking social practices. We need to discover mechanisms with which to express the absences in the social structure and the processes of absenting absences – that is to say, the path by which collective action shows how social reality is constructed over social faultlines.

2) We need to understand collective actions as symptoms of social conflicts, and as signs of social relations. Social protests are manifestations relating to social conflict or its functions that are suggestive of social organisation.

3) We need to interpret collective actions as messages that mark the borders of systemic compatibility and say something about the 'limits' of social power.

From this perspective it is possible to identify the configuration of a world image that includes faultlines, silences and omissions in our theories, which may be seen as a form of resistance against a geopolitically determined reason.

If we put together the critical analysis of the absences, symptoms and messages that describe collective actions, it is possible to see how our own theories reside within the field of academic colonial fantasy. Many South-American scientists experience the impossibility of inclusion because of this fantasy, taken as an ideological mechanism.

Finally, telling a story of social protest involves becoming a part of the conflict network

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or, at least, contributing to the building of one side of hegemonic discourse. Writing this story is a practice of identifying and co-writing a social-science text about social-protest messages. From this inter-subjective position reflexive skills may be used; this scientific practice implies (paraphrasing Melucci) listening to and interpreting the practices of the nomads of the present.

In another vein, writing a history of social movement and protest involves assuming a particular observer position regarding scientific understanding about it. This scientific practice involves taking a position in relation to scientific struggles and becoming a part of one side of the fight for the possession of the authorised word.

Neither telling a story nor constructing history is a neutral process of our understanding. Aside from any kind of prophetism and vanguardism, the question of the place of the social scientist in a democratic and emancipative process is still very much open and may well become a decisive issue.

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## ABSTRACT

### SOCIOLOGY AND EPISTEMOLOGY IN STUDIES ON SOCIAL MOVEMENTS IN SOUTH AMERICA

This paper aims to show that changes in social-scientific approaches are needed as a way to explain and understand social protest and movements in the South American context; it also aims to point up the possibilities for getting lost in the logic of a geo-politically centred rationality. To this end, first, I will summarise the social context of different social movements and protest forms since the 60s. Second, I will present a synthesis of the theoretical perspectives on social protest and movements. Third, I will highlight some epistemological and methodological issues in studies on collective action. And finally I will explore the connection between the historical context and studies of collective action in South America today, in order to identify a current agenda for such studies.

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