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José Medina Echavarría: An intellectual profile

*Adolfo Gurrieri**

José Medina Echavarría is one of the most important sociologists of Latin America, and he was the sociologist who has exerted most influence in CEPAL, where he worked with minor interruptions from 1952 until his death in 1977. This article seeks to give an overall view of his work, with the central purpose of showing the mainstream that is to be found by the serious reader of Medina's work.

Medina's thinking forms a contribution of the highest value for all those who are seeking to formulate an integrated theory of development or social change. Medina began by giving his conception of social science a strict basis, because he considered that it constituted an essential instrument for the rational reconstruction of society (chapter I of this paper); he went on to carry out a lengthy examination of the particular object of sociology in comparison with the other social sciences and established a basic conceptual framework (chapter II); he used this conceptual framework to lay the foundation of the sociology of development, a task which culminated in his presentation of the "social conditions of development" (chapter III); he used these conditions as tools for analysing the history of Latin America and evaluating its present situation, and in the light of this situation, which he considered to be very unsatisfactory, he stressed above all others the intrinsic values of democracy as a form of social coexistence, underlined its compatibility with the pursuit of economic development through planning, and defended it from economic attacks (chapter IV). Medina's last work was to make a prospective examination of the hopes that exist for international détente and internal democracy in the light of the probable scenarios for the world order (Epilogue).

*Technical Secretary of the Review. This essay was presented by the author in lectures which he delivered at the Centro de Capacitación para el Desarrollo (CECADE) in Mexico in July 1979.

Introduction*

*Died, did you say? No! all we know of this,
Is that he left us by a shining path,
Charging us only that we should not mourn,
But should remember him through work and hope,
Striving for goodness; seeking only that,
Which he so freely gave us: his great soul.*

(Antonio Machado)

We Latin Americans are enthusiastic devourers of theories. We do not savour them slowly, endeavouring to extract their essence with pleasure, but gulp them down rapidly, either to incorporate them whole or, on the contrary, to make them disappear and, at the same time, eclipse those who created them. How social science has suffered—and still suffers—from this fatal combination of uncritical acceptance and absolute rejection!

For this reason the spread of Medina's thought has lessened markedly in recent years. It is true that Medina was never a saint who provoked great devotion among social scientists in Latin America, but he did have his periods of great prominence—in Mexico in the first half of the 1940s, or when, from Santiago, he contributed to the vogue of the sociology of development between the end of the 1950s and the beginning of the 1960s. However, in his last years he had the feeling that publishing his papers was more or less equivalent to throwing them into the sea; and he certainly believed that many of his colleagues in CEPAL, with whom he spent almost 25 years, shared in that indifference.

The fact that Medina's approach does not form part of the currently dominant sociological school in Latin America does not provide a complete explanation for the fact that his views barely took hold in these parts. Considering the undisputed potential richness of his work, it is clear that there are other reasons

*Among the many colleagues who kindly encouraged me and offered their comments I should particularly like to mention R. Cibotti, N. González, J. Graciarena, A. Núñez del Prado, A. Pinto, R. Sánchez, E. Torres Rivas and M. Wolfe. G. Weinberg ungrudgingly allowed me to benefit from his erudition and patience, while R. Prebisch not only discussed the entire text in detail, but also, through his example, constantly reminded me of the value of intellectual effort.

which hindered its spread. Firstly, there was his proverbial refusal to use institutional platforms to extol his own ideas—an attitude which, rooted in his natural modesty, became further consolidated in his mature years as a result of a profound weariness which led him to avoid the increasingly uncompromising ideological struggle. Secondly, the literary style which he used in many of his works, especially those of his maturity, did not help much to ensure that his ideas were understood.

His essays—just as his classes used to be—are complex elaborations on a central idea; from this kernel he moves backwards and forwards, shifts his view to all the aspects which strike him as relevant, and often makes use of digression and parenthesis. He scorns categorical statements, and almost never seeks to offend the reader by underlining, which he felt was like saying “attention, this is what is important!” Accordingly he presents his ideas in such a way that the reader can penetrate to them through elegant expressions and erudite suggestions which at times even seem out of place, just as reality is often discovered behind the apparent disorder of a surrealist painting. Consequently, if this posed difficulties for the sociologists who surrounded him, what a problem it must have been for economists, engineers and planners!

For this reason, the present essay seeks to help to revive Medina's thinking and the reading of his works, by endeavouring to present in a connected way the main ideas set forth in his most important writings, using the broad strokes that he himself would not have permitted. But will these really be his main ideas? Will this essay manage to grasp the core of his thinking, separating the essential from the incidental? With a writer like Medina these questions will never have a final answer.¹

¹The inevitable process of elimination which has had to be carried out here has excluded not only Medina's occasional reflexions, but also some topics—such as the role of education in economic development—which it is difficult not to regard as main ideas. The author is aware of this shortcoming, for which his only excuse is his personal judgement and the fact that it is impossible to further lengthen an already rather long article, and expresses the hope that other colleagues will analyse these topics themselves in order to round out the intellectual picture of Medina.

At all events, whether or not these are his main ideas, and whether or not one agrees with them, it is certain that they cannot be gaily thrown overboard, as he used to lament had happened to the ideas of many classical authors in his discipline. The weak and repressed sociology of Latin America cannot permit itself such waste, nor can it spend time seeking what has already been made clear, and still less can the sociologists and economists of CEPAL do this, at a time when neoclassical economists, with its simplistic assumptions about society and its rejection of sociology, is taking over as a paradigm of the social sciences in many countries. It is precisely this neoclassical domination that gives Medina's work as a whole an unexpected topicality. Few in Latin America fought as he did for an interdisciplinary approach respecting the scope of each discipline and avoiding the blinkered approach of any of the isms. Few fought so hard for an economic sociology capable of providing real sociological assumptions for use in analytical efforts in economics, thus supplying the concrete historical content which economics usually lacks. Few urged more than he did the importance of the political framework of economic activities, not only as a vital theoretical element but also as a fundamental body of ideals relating to human coexistence which he placed—as in the case of democracy—in a preeminent position.

Medina's work as a whole represents a valuable contribution for all those who wish to formulate an integrated theory of development or social change. It begins by providing social science with a rigorous foundation, since this constitutes an essential tool for the rational reconstruction of society (chapter I of this essay); it continues with detailed consideration of the specific object of sociology *vis-à-vis* that of the other social sciences, and establishes its basic conceptual framework (chapter II); it draws on this conceptual framework in order to lay down the foundations of the sociology of development, a task which culminates in the presentation of the social conditions of development (chapter III); it uses these conditions as tools for an analysis of the history of Latin America and an evaluation of its present situation (chapter IV); in the light of this situation

—which is not at all satisfactory, in his view— he highlights above all other values the intrinsic value of democracy as a mode of social coexistence, underlines its compatibility with the achievement of economic development through planning, and defends it from attacks

based on economism (chapter V); and ends with an examination of the prospects for international *détente* and internal democracy in the light of the possible world scenarios (Epilogue).

I

Science and politics in the early works

The political significance of the methodological problems

If one examines the whole of Medina's work, it is easy to conclude that, although to begin with it is devoted to methodological problems, as time goes on it acquires an increasingly substantive character, culminating in the treatment of the most urgent issues of present and future sociopolitical organization. Or, put more simply, if the logic of the social sciences stood at the focus of this concern up to 1940, that focus would seem to have shifted towards democracy in the 1970s.

This interpretation of the development of Medina's thinking is correct provided it is borne in mind that this variation does not mean a radical change of perspective, but merely a modification of the angle from which he perceives the same problems. This is so because in his thinking, as in that of many illustrious predecessors, the logic of science and political organization, reason and democracy, are intimately linked.

In the Preface to *Sociología: teoría y técnica*, Medina emphasizes that the social sciences should become true sciences, and that for this purpose they must meet the necessary theoretical and technical requirements—in other words, possess a carefully prepared system of categories and a unifying scheme, in addition to subjecting research to the strictest rules. When transformed into sciences they will be able to avoid the action of the charlatan and the 'mountebank', which is particularly important for sociology, since it "has always

suffered most from improvisation, and this is what it is important to nip in the bud among the younger elements".²

But does Medina investigate the philosophical depths of methodological problems only in order to provide social sciences with a rigorous foundation? Although this aim alone would justify the undertaking, Medina does in fact go further, since he holds that the social sciences should possess the best possible scientific foundation in order to play their instrumental function properly: in a time of crisis the social sciences must respond better than ever to the demand that they should serve as a guide for human action. Like Comte, a century earlier, he demands that the social sciences, transformed into genuine sciences, should offer substantial assistance in the formulation of a rational policy, in the sound management of human affairs.

Hence the urgent and dramatic nature of methodological problems: scientific rigour must be achieved not just as a value in itself, but as a foundation for a new way of organizing human coexistence. "To permit social science to commit suicide is equivalent to declaring the decline of our civilization to be inevitable."³ The indissoluble union between science and

²*Sociología: teoría y técnica*, 2nd. ed. (Mexico City, Fondo de Cultura Económica, 1946), p. 8. (The first edition dates from 1941.)

³"Reconstrucción de la ciencia social" (1941), in *Responsabilidad de la inteligencia. Estudios sobre nuestro tiempo* (Mexico City, Fondo de Cultura Económica, 1943), p. 62.

politics is undoubtedly one of the basic keys to Medina's entire thinking.

In the face of the spectre raised by the general crisis of those years, Medina therefore reaffirms the rationalist ideal of the need for the scientific organization of society on the basis of the knowledge supplied by the social sciences. And in his first writings, between 1939 and 1943, he elaborates upon and examines more deeply what must, in his view, be demanded of the social sciences in scientific and instrumental terms. These demands are very numerous, very complex and not always consistent, so that in analysing them Medina is obliged to enter deeply into many of the problems related to the embodiments, forms and limits of reason.

It is true that Medina's propositions can prove utopian and at times even somewhat contradictory —contradictory because of the inconsistencies which may arise from the scientific and instrumental demands he places on the social sciences—but there is no doubt that those first essays represent one of the most profound explorations of the logic of the social sciences ever carried out in Hispanic America.

The crisis as a backdrop

Towards the end of the 1930s and the beginning of the 1940s it was almost impossible to avoid the feeling of living in a critical period; Medina is no exception, and he adds his personal experience of the Spanish conflict and exile to the more widespread experience of economic chaos, the disintegration of many liberal democratic régimes and war.

This awareness of crisis is the point of departure for his thinking, and always remains the backdrop; however, he never analyses the crisis comprehensively because he feels that, to a large extent, the task has already been done by others. "Analysis of the crisis has been carried out from various viewpoints, and all the men of my generation have had to deal with the subject in some way."⁴

⁴*Sociología: teoría y técnica*, op. cit., p. 12.

Nevertheless, the topic has a central place in Medina's thinking, and it must be reconstructed on the basis of the various references he makes to it.

In principle, and whatever the content of the crisis, he never regards it as a certain indication of a disaster which cannot be overcome. For example, in the first pages of *Sociología: teoría y técnica* he analyses the situation through which sociology was passing at the beginning of the 1940s, under the subtitle "continuity or crisis?", and emphatically asserts the primacy of the former. It is true, he says, that sociology is suffering from a crisis of objectives and methods, but the crisis is not of a fundamental nature—as was asserted by Ortega—because it does not arise from dealing with a non-existent object or using absolutely inappropriate methods. It is, rather, a crisis of growth since "as a science it is pursuing a process of maturity that marks a line of perfect continuity reflected in the constant purification of its scientific conscience and of the appropriate methods".⁵ If Medina's thinking on this subject is to be understood correctly, it must not be forgotten that, in his view, the foundations regarding the methods and purpose of sociology were laid by Comte, and the "line of perfect continuity" starts with him. In the same way, when in his last essay he returns to the "crisis of Western democracy", he emphasizes that the crisis must be defined "in its strictly etymological sense, as meaning a particular stage in the evolution of a system which is marked by sufficient symptoms of vacillation and disturbance to indicate a state of transition, ruling out neither the recovery and reinvigoration of the system of its final disintegration and collapse".⁶

But what is in crisis? Among the various components of the crisis one emerges which, because of its importance, makes it possible to place all the others in order: reason. He conceives the crisis as a phenomenon (or process) in which reason (or the process of rationalization) plays a fundamental role.

⁵*Ibid.*, p. 15.

⁶"Notes on the future of the Western democracies", *CEPAL Review*, N.º 4 (second half of 1977), p. 119 (United Nations publication, Sales N.: E.77.II.G.5).

If reason is at the centre of the crisis, what does he understand by reason? It is difficult to answer, because over the years Medina changes his view of the nature and relations of the various manifestations of reason. In this way, it may be said that if all the components of the crisis become imbued with significance in the light of the role which reason plays in them, all the manifestations of reason are ordered on the basis of what Medina calls formal rationality.

From the sociological viewpoint, Medina differentiates —following Weber— between various manifestations of reason which constitute types of rational action.⁷ Among these types he highlights formal rational action, which is that designed to achieve a given end by means of rational calculation (efficient or optimum adaptation of means to ends, prediction of consequences, and so on) and the functional organization of the elements which go to make it up (each component of action has a defined role and a defined function). Formal rational action is the ideal type of action in the field of science, technology and economics, and for that reason is usually presented as the paradigm for any rational action; such expressions as rational action consistent with aims (M. Weber), logical action (Pareto), economic action (Robbins), and technical or technological or instrumental rationality, are merely different names for it.

To a large extent formal reason is the cause of the crisis, but it is also the appropriate means of successfully tackling it. "Of course, it is to reason that we owe the conditions of this great crisis. For it has been the triumphs achieved by reason in its tenacious confrontation with implacable nature which have made man excessively powerful in a partial aspect of his life: the most external and fragile aspect. But only reason, in turn, can re-establish the balance between the intimate, repressed springs of action and the mechanism produced by a

unilateral inventiveness."⁸ In other words, "in order at least partially to dominate the social, collective situation, man must use the same means he used successfully to impose his will to some extent on his natural, physical circumstances: patient study, previous devotion to reality as it really is ... the deployment in the face of social reality of the scientific attitude, already well tested in other problems".⁹

There is no doubt that the Medina of those years places enormous trust in the positive role which the deployment of formal reason could have for man, or, expressed in his own words, in the value of science for human life. Nevertheless, one must not fall into the error of assuming that, in those initial stages, Medina is naively convinced of the gradual advance of reason in history, for a reality as complex as that of those years naturally ruled out any evolutionary, linear view of human events. From his very first writings, Medina observed the difficulties provoked by the deployment of reason, and with the passing of the years reaffirms that conviction.

In his first writings Medina suggests that the principal meaning of the crisis of reason is none other than that of a unilateral development of reason in favour of the dominion of nature without a parallel concern for man and society. Broadening this point of view, in an essay dating from 1939 he sketches an approach to the crisis which centres around the process of rationalization and combines the vertical and horizontal perspectives of social change.¹⁰

In formulating his approach Medina was probably influenced by K. Mannheim's theory of the disproportion between the high level reached by man in the knowledge and domination of external nature—which is expressed in the development of the natural sciences and of the techniques linked to them—and the poor progress he has made in knowledge and control of himself and society. Moreover, there are

⁷ Medina formulates and presents this typology in his essay "La planeación en las formas de racionalidad" (1969), which appeared in *Discurso sobre política y planeación* (Mexico City, Siglo XXI Editores, 1972), but it is clearly implicit in his early writings, though in a rather embryonic form.

⁸ "Reconstrucción de la ciencia social", in *Responsabilidad de la inteligencia*, op. cit., p. 63.

⁹ "Sentido y función de la Sociología" (1939), in *Responsabilidad de la inteligencia*, op. cit., pp. 79-80.

¹⁰ "Configuración de la crisis" (1939), in *Responsabilidad de la inteligencia*, op. cit., pp. 157-182.

indications that he also considers the thesis, so common in the English-speaking world in those years, which contrasts the great progress of 'material' culture with that of 'spiritual' culture; in other words, the imbalance between scientific and technical development and the development of the principles which guide political, educational, religious, family and other activities.

Nevertheless, as already noted, Medina does not share the evolutionary assumptions which underlie many of these theories. Following in the steps of Alfred Weber, he holds that human history is made up of three fundamental processes—civilizing, social and cultural—but only the first of these, which has scientific and technical development as a nucleus, can be conceived as linear and evolutionary, while the others, though they manifest features reflecting a degree of evolution, tend to be specific to each of the 'historical bodies'. As a result, from this viewpoint, the crises should be interpreted as maladjustments or contradictions which occur between scientific and technical progress and the socio-cultural order in which this progress occurs.

Furthermore, these contradictions must not be perceived only 'vertically', over a period of time which is the same for all men, whatever their civilizing, social and cultural differences, but also horizontally, in other words as a result of the coexistence of groups or 'peoples' with different historical tempi. This coexistence of different and unequal groups and peoples leads to a wide variety of relationships—from the 'dissemination' of ideas and institutions to economic and political conflict—which usually produce profound disturbances.

Conceived in this way, within a multi-dimensional perspective which combines the horizontal and vertical approaches, this conception of the maladjustments of the process of rationalization is of great theoretical importance for Medina, to such a point that it will appear later in his first essays on the sociology of development. The social conditions of scientific and technical development, social adaptation to the new type of life which is being created, and its positive and negative social effects, form the background to the theory of

the conditions and consequences of economic development.¹¹

However, for many of those who have reflected on this subject, the problems generated by the development of formal rationality are not limited to disproportions in its application to nature, society and culture, but also arise in relation to its 'excesses' and the results which these may have on the other forms of rationality or other types of rational action. When Medina raised these problems for the first time, two critiques of the process of formal rationalization were very much in vogue. On the one hand, Mannheim¹² argued that together with formal rationality—which he called functional—there existed substantial rationality, which he defined as "an act of thinking which reveals an intelligent view of the relations existing between the facts in a given situation". This "intelligent view", which is necessary to guide human action, requires a fairly full perspective of the situation, but the shaping of this perspective is, paradoxically, disturbed by the development of formal rationality, which, with its constant division of tasks and functions, makes knowledge partial, prevents the majority of the population from having a reasonably complete view of the society as a whole, and concentrates the power and the substantial rationality in the ruling minority. Medina does not deal with this version of the crisis of reason in his first writings, but it is clear that he believes that the social sciences can contribute to meeting Mannheim's demand that a better balance should be achieved between formal and substantial rationality. Medina feels that the role of science in the development of formal rationality is undeniable, but it is important to emphasize in addition the role it plays in relation to substantial rationality. Following Dewey, he affirms

¹¹This is also a very important point of contact between economic and sociological theory in CEPAL thinking, since the multidimensional perspective for the analysis of social change proposed by Medina has much in common with the viewpoint used by Prebisch in considering economic development: that of the penetration of technical progress into the peripheral social structure.

¹²*Libertad y Planificación Social*, translated by Rubén Landa (Mexico City, Fondo de Cultura Económica, 1942), p. 52.

that "at this point what matters is not the present results of scientific research, its body of doctrine, so much as the scientific attitude, that position of the spirit and behaviour which, amongst other features, is manifested in the capacity to use ideas as hypotheses subject to verification and proof, and not as dogmas. In this regard the future of democracy depends on the growth and predominance of the scientific attitude".¹³

Other writers—notably W. Dilthey—hold that formal rationality, as a result of its origin in the natural sciences, is content to provide knowledge of meaningless empirical data—the disenchanted world of Weber—and that, accordingly, another rationality (later called by Medina 'material') is needed to make it possible to grasp the 'meaning', 'significance' or 'value' of human activities.

Medina considers this point of view and devotes a large part of his works of those years to demonstrating—in this case following in the steps of Max Weber—that while many of the 'data' of social science, in contrast to those of natural science, are defined by their meaning, this in no way means that they cannot be scientifically analysed. Material rationality—conceived as interpretative rationality or understanding—must be combined with the explanation and prediction specific to formal rationality in the methodical perspective of social science.

Everything indicates, then, that this second form of viewing the crisis of reason—which critically analyses the evolution of formal reason in order to point out its limits (what it can not offer) and its excesses (what it claims to offer without being able to do so)—is only hinted at in Medina's early thinking and that, in addition, he feels that the problems this raises will be solved to a large extent through the proper development of the social sciences. Nevertheless, as the years pass Medina gives this view of the crisis an increasingly important role as a consequence of a clearer and less optimistic view of the function of formal reason in human life.

¹³"John Dewey y la libertad" (1939), in *Responsabilidad de la inteligencia*, *op. cit.*, p. 269.

The failure of the social sciences

After this rough outline of the backdrop of his thinking, we must pose the specific question which occupies Medina in those years. In his words: "is the already intolerable state reached by our civilization susceptible of being cured by reason, or must we abandon ourselves hopelessly to the play of blind forces?"¹⁴ "how can we understand one another amidst this chaos and disorder?" "how can we renew our history without destructive convulsions?"¹⁵

Since within this "cure by reason" science is the fundamental medicine, we must ask: what has been and what should be the role of social science?; how has it responded to the challenge of the crisis?; must it be reconstructed so that its contribution is in line with what is expected of it?; and if so, how should we guide this reconstruction? For Medina, the response of social science to the crisis has been and remains rather discouraging, since he seems sure of the "complete uselessness of social science for solving the real problems of our everyday lives".¹⁶ The success of natural science in the nineteenth century in the sphere of nature fed hopes of a similar triumph in the human sciences; but once these came up against the crisis, the result was "frankly negative".

There are three reasons for this failure. Firstly, the poor links between theory and praxis, the "unbridgeable distance between what appears as a scientific construct and what we experience and perceive as reality", between experience of life and what seems nothing more than an 'honourable fantasy'. The construction of theory in the social sciences was guided by the desire to "refine as much as possible the traditions inherited from the various schools",¹⁷ and in this task it has been usual to get lost in "'profound' thinking which, rooted in a vitally urgent human need, hoists

¹⁴"En busca de la ciencia del hombre" (1942), in *Responsabilidad de la inteligencia*, *op. cit.*, p. 29.

¹⁵"Responsabilidad de la inteligencia" (1941) in the book of the same name, *op. cit.*, p. 16.

¹⁶"Reconstrucción de la ciencia social" (1941), in *Responsabilidad de la inteligencia*, *op. cit.*, p. 42.

¹⁷*Ibid.*, pp. 43 and 46.

itself up, in fascinating attraction, until it finally hangs over a bottomless void".¹⁸ This abysmal suggestion of those who practice such 'intellectual mountain climbing' has carried social theory away from the urgent decisions of everyday life and has discredited intellectuals in the eyes of the common man.

This gap between theory and praxis takes different forms in the different social sciences. In economics, conventional economic theory effects analyses which appear fragmentary, in that they can not take into account all the significant factors in a very complex situation; out of date compared with reality, because of the great dynamism of the latter; and too general to deal successfully with problems which arise in unique circumstances. For that reason, economic theory—timeless, closed in its deductive consistency, and free of empirical contrasts—is not valid for a reality which is "interdependent, dynamic and capable of being grasped only in the fullness of its circumstantiality".¹⁹ The gap between political theory and reality does not even have the excuse of being based on a methodological position, since it often only represents the defence of an inapplicable general formula, and historical theory converts it into antiquarianism and erudition, enabling the past to attract and 'enslave' the present.

The second cause of the uselessness of social science lies in the widespread acceptance among scientists of the criterion of objectivity based on neutrality in values, i.e., the view that science neither can nor should decide which values should guide conduct. But the facts of social science are mostly values, and as a result accepting these facts without subjecting them to rational analysis merely amounts to upholding the *status quo*. "If this is all your objectivity amounts to, then you can keep it, because it seems useless and suspicious to us is the reaction, and indeed the attitude is not always limited to or satisfied with such moderate words."²⁰ Such a criterion

might have been considered acceptable in the historical circumstances which produced it, but has led to suicidal inhibitions; the refusal of scientists to participate in decisions based on values weakens their ability to defend their own right to truth and freedom of research—which is the value that justifies their existence—and leaves the field open for other, less vacillating forces to take the decisions.

The third cause, closely linked to the first, is the 'anarchy of specialization', the marked absence of links among the various social sciences "which sterilizes their results, by not mutually fertilizing them".²¹ It is true that one cannot think without concepts, which are always an abstraction, and that it is impossible to make progress in science without specializing, but it is necessary to seek methods which avoid the 'phantasmal monsters' produced by short-sighted and compartmentalized specialization.

These reasons explain why the social sciences have proved ineffective in dealing with the urgent problems of everyday life, and why there has been a progressive loss of trust in reason. Practical decisions, lacking this guide, have been based on elementary empiricism, routine or improvisation, and the man in the street has often ended up accepting the "miraculous" solutions of 'political miracle workers', and even supporting the well-known aphorism about the revolver and culture.

In the face of a social science which is unreal, fragmentary, neutral and therefore useless, two reactions have occurred, which Medina also firmly rejects. Firstly what he calls 'militant science', which abandons the extreme of abstraction to giving over to that of ideological belligerence. It should not be forgotten that "denying neutrality in values is not equivalent to proclaiming the unrestrained rule of partisan interests, but on the contrary the possibility of finding a limit to it";²² and the limit is that of scientific rationality. Secondly, in the face of the excesses of theory, it is declared that the scientist should dispense with theory and deal only with facts. This 'innocent em-

¹⁸"Responsabilidad de la inteligencia", in the book of the same name, *op. cit.*, p. 17.

¹⁹"Reconstrucción de la ciencia social", in *Responsabilidad de la inteligencia*, *op. cit.*, p. 49.

²⁰*Ibid.*, p. 54.

²¹*Ibid.*, p. 56.

²²*Ibid.*, p. 29.

piricism' piles up data in an unconnected manner without observing that data or facts are not primary components of experience but, inevitably, constructs which derive from hypotheses or theories.

The reconstruction of the social sciences

It is imperative to reconstruct the social sciences, because they must play a fundamental role in the 'cure by reason' of ailing society; and this reconstruction implies, firstly and in a strict sense, their conversion into sciences. They will be genuine sciences when they satisfy two conditions, which are so closely related that they are more like the two sides of a single coin: their results must have been obtained using the 'scientific method', and their practitioners must be guided by a 'scientific attitude'.²³

The scientific method, as a way of gaining knowledge of reality, is not substantially different from the pre-scientific procedures by which man seeks the same end. Knowledge of reality is always a product of the combination of practical action and symbolism, but the former—practical action, 'praxis', in short, the exercise of an activity—precedes the second; in the cognitive construction of reality "a real object is, first and foremost, that which opposes us, in other words which stimulates and resists our activity".²⁴ Practical activity has purposes—aims, intentions—which guide its 'directions' and give rise to a selection of the data which can be sensed; this selection shapes or typifies the reality, highlighting the aspects which have the greatest influence on the activities being carried out. Thus, reality is 'constructed' by praxis as a set of 'shapes' or 'forms'.

Symbols, especially language, not only express feelings and emotions but also make it possible, firstly, to 'socialize' reality, to share it, since "each word includes the symbol of an experience communicated and shared";²⁵ and,

secondly, to order and formulate coherently the reality previously shaped by the praxis. This 'reality' of a practical-symbolic origin is the foundation for any conception of the world, and the basis for scientific knowledge.

It is necessary to underline the relationship between praxis and symbol which Medina sets forth—in which the former precedes and predominates over the latter—in order to dispel the assumption that he shares the empiricist view—still very widespread in the philosophy of science—that it is in the process of acquiring knowledge that man constructs his reality. Practical activity precedes and orients knowledge, and the symbols which knowledge uses—concepts and their relationships—do not derive from the arbitrary interest of the researcher selecting among an amorphous mass of empirical data, but from a reality previously shaped by the praxis.

However, once this fundamental idea has been clarified, it is also necessary to underline that all real flesh-and-blood men meet, in their praxis and their knowledge, an already constructed situation where the 'forms' combine in a very close and only analytically distinguishable way both the praxis which gave rise to the reality and the symbol which denotes it. I believe that Medina would agree that his analysis of the relationship between praxis and symbol has a great formal similarity to that which many economists establish between material and social conditions of production. Analysis of the economic activity carried out by an isolated individual, "Robinson Crusoe", not considered as living in a society serves to show the material basis of the process of production, which, in a subsequent stage of the analysis, is "socialized". However, this analytical recourse should not lead one to forget that in concrete economic activity, the process of production appears from the outset to the real flesh-and-blood man as an almost inseparable union of material and social conditions. The same occurs with the relationship between praxis and symbol; the praxis shapes reality and the symbol reflects this shape, with greater or lesser fidelity, but for the man of flesh and blood, the situation is practical and symbolic from the outset.

It might therefore be said that, for Medina,

²³"En busca de la ciencia del hombre", in *Responsabilidad de la inteligencia*, *op. cit.*, p. 30.

²⁴*Sociología: teoría y técnica*, *op. cit.*, p. 101.

²⁵*Ibid.*, p. 102.

there are various levels of knowledge of reality; a 'pre-symbolic' level, which is that of many non-human living beings; a 'symbolic-common' level, which is that typical of language; and a 'symbolic-scientific' level, which is scientific knowledge proper; in other words, the knowledge which is obtained using the scientific method is only a refinement of the connexion between symbol (concept, hypothesis) and praxis (experiment).

The precedence of praxis over symbol is manifested in scientific knowledge in the fact that the latter is always preceded by a 'problematical situation'. "If there were no problematical social situations, social science would not exist",²⁶ since they serve as a spur to knowledge. The theoretical 'solution' of the problematical situation often requires a process of 'drilling' which enables the analysis to penetrate to ever-deeper layers of reality. Of course, in order to avoid intellectual abstruseness, the theory should also always offer a practical solution to the problem which gave rise to it.

This process of drilling through reality in the search for an explanation capable of providing a practical solution to the problem is not guided by the facts themselves, as the positivists believed, but by a 'provisional key'—an *a priori* hypothesis or prejudice—which acts as a guide to knowledge. In the cross-fertilization between hypothesis and reality ('experience') the theory is originated, but this theory never loses the hypothetical character it had at its origin, however large the number of 'confirmation' of it, because "there is no conclusive experiment, nor can it ever be ruled out that some alterations in it will invalidate totally or... partially our theoretical construct",²⁷ and it is therefore necessary to resign oneself to the "relative truths of experimental intelligence".²⁸ Problematical situation, hypothesis, relationship between hypothesis and experience, theory, practical solution, hypothetical nature of the theory and attainment of truths which are only provisional: these are some of

the fundamental aspects of the scientific method suggested by Medina.

The scientific attitude of the researcher should consist fundamentally in accepting and practising the norms of the scientific method; it follows from this that the scientist must not be 'free of values' but, on the contrary, should vigorously uphold those which are specific to scientific enterprise. Of these values, Medina emphasizes the importance of two: humble submission to the verdict of experience over and above any personal preference, and acceptance of theories as hypotheses and not as established dogmas, for all knowledge is only relative and provisional.

Medina holds that the social sciences should genuinely transform themselves into sciences, which means accepting and practising the scientific method, and although they should not imitate the natural sciences in everything, they must "apply to the social datum the procedures of conceptual construction used in that science [physics] with evident success".²⁹ The scientific method is the same for all the sciences, whatever their subject, and no special method can be derived for each on the basis of the alleged special character of its subjects.

However, insistence on the 'unity of the scientific method' does not lead him to forget the special difficulties which arise in applying it in the social sciences. On the one hand, the concepts that they use are usually symbols of other symbols, because social phenomena are to a large extent symbolic; on the other, they are usually very similar to the terms of the common language and, moreover, refer to a complex and changing reality which can very rapidly make them obsolete. At all events, although these difficulties can prevent the pure application of the scientific method to the social sciences, they do not make it less necessary that they should be subject to its general principles.

The instrumental character of the social sciences

Science in general stands at the service of man, and must maintain this instrumental character

²⁶ *Ibid.*, p. 126.

²⁷ *Ibid.*, p. 128.

²⁸ "En busca de la ciencia del hombre", in *Responsabilidad de la inteligencia*, op. cit., p. 31.

²⁹ *Sociología: teoría y técnica*, op. cit., p. 126.

by helping him to alleviate his problems. In the case of sociology, however, this requirement is still more imperative, since it is imposed by the very nature of this discipline's subject: the forms of human life. "What is asked of it is an orientation for life. This orientation is, at the same time, a rational clarification of the conditions and trends encompassed by the social circumstances in which our actions occur."³⁰ In other words, the instrumental nature of sociology is defined as the rational clarification of these social circumstances, but what does Medina understand by these terms?

a) *The social circumstances and their various levels of analysis*

Medina expects that social science should guide men not only in a general way, but also in their concrete and everyday reality and, accordingly, that it should help them to understand the specific social situation in which they find themselves and provide a little security for their behaviour in it. This social situation or circumstance appears as a 'concrete whole', which means, firstly, that its parts are inter-related ('whole'), and secondly that it possesses particular features which make it a 'historical individuality' different from those in the past and in the future ('concrete').³¹ For this reason, sociology may be termed a 'concrete science', because it endeavours to understand and explain the 'real structure', the fundamental nature of the concrete social circumstance, its derivation from another structure and its tendencies.

Before sketching some of the methodological problems presented by this concrete nature of sociology, it is necessary to emphasize how much in advance Medina's thinking was. In the same way that, in relation to the scientific method, he was far-sighted enough to incline towards an approach of the "deductive hypothetical" type—which would only become widespread many years later—when the predominant approaches were empiricist or 'comprehensive', his insistence on the con-

crete nature of sociology led him to propose an approach which was to spread in Latin America with great success many years afterwards, under the name of 'historico-structural'. For the last ten years or so this perspective has predominated in social science in Latin America as the principal banner in the methodological struggle against 'structural-functionalism', but no one remembers that Medina proposed it as early as 1940.

It is also evident that the far-sighted nature of Medina's thinking is due in good measure to the positive influence of Max Weber. However, it would be a mistake to think that Medina accepts uncritically and in a wholesale manner all the propositions made by that thinker. It can only be maintained that Medina was a 'Weberian' if that is taken to mean that he adopts Weber as a "referent", in other words as the interlocutor with whom he wishes to discuss all significant problems. This 'debate' produced agreements and disagreements, including among the latter some which are found in the approach which Weber proposes for ascertaining the 'historical individuality' of social circumstances.

Max Weber believed that the natural and social sciences were clearly differentiated by their theoretical intention or aim. The natural sciences, using the principle of causality, attempt to formulate general laws (valid for all times and places) which make it possible to explain the relationship between phenomena and to control or dominate reality. For the natural sciences, individual phenomena are of interest only as 'cases' which belong to general 'classes', and the relationships between them only in so far as they are manifestations of a general law. The social sciences have a different aim, since they attempt to understand and explain historical individualities; they do not aim to formulate general laws, but specific relationships between individual phenomena, and as a result their principle of causality takes the form of a 'concrete imputation'; what is of most interest in their analysis is that which is individual and particular, while that which is general is only a 'means' or a 'preliminary task' for gaining knowledge of society proper. Both use the scientific method, but with a very different approach.

³⁰*Ibid.*, p. 71.

³¹*Ibid.*, p. 74.

Medina fully agrees with Weber that it is necessary to analyse concrete situations in a scientific manner, but he does not accept the sharp distinction that Weber draws between natural and social sciences. In his view, the natural sciences are also interested in individual phenomena and the social sciences in general phenomena, and moreover it does not seem correct to him to agree that some are interested only in 'dominating' reality and others only in understanding it.

With regard to this point there are two interpretations of Medina's thinking. If one accepts the historicist version of M. Weber's viewpoint as presented by Medina in his early writings, there is no doubt that Medina's methodological position falls between the traditions of Weber and Comte. Medina himself gives grounds for this interpretation when he states that between them they drew the picture of the methodological problems of present and future social science.³² If, on the other hand, as seems more correct, Weberian thinking is conceived as a combination fluctuating between the analytical and the concrete approaches, one may conclude that Medina inherited from Weber the problem of the coexistence of these approaches, both necessary but with different methodological requirements.

At all events, by refusing to accept the existence of a sharp division between the approaches of the natural and social sciences, and by underlining the principle of the unity of the scientific method, Medina substantially increases the requirements placed on the social sciences, since these must satisfy both the requirements for the generalization of the scientific method typical of the natural sciences and the requirements for particularization in the concrete analyses called for by the instrumental nature of social science. In other words, they must combine general with circumstantial knowledge.

Medina points out clearly the tension produced by the twofold requirement of grasping the general law and guiding men of flesh and blood in concrete circumstances. In the particular case of sociology, he believes that

the solution consists in developing approaches at various levels of generality, which he calls historical, structural and analytical. Each possesses its own specific concepts and laws, but they must maintain close links in order to cross-fertilize each other. In his later writings there are few specifically historical analyses, and he devotes only one work to presenting the fundamental concepts of the analytical approach, thus clearly indicating that he prefers the structural approach. With regard to this latter approach, he reiterates the need to explore thoroughly the suggestion made by J. S. Mill, and developed by Mannheim, of the 'principia media', i.e., those relationships among phenomena which, though linked to general laws, are specific to a certain level of development or a given historical phase.

At all events, however, the path towards the structural and historical approaches must be opened by the strict and general categories provided by the analytical viewpoint. If it is necessary to choose between them because the instrumental aspiration contradicts the scientific requirements, these latter must be preferred. The concrete or instrumental nature of sociology "indicates only an orientation and a service, since as a science it aspires to theory and is subject to the norms for the construction of science in general".³³

b) *Rational clarification: formal or material?*

The tension between the analytical requirements of the scientific method and the need for the knowledge provided by it to be capable of providing guidance in concrete situations obliges Medina to diversify the approaches of sociology in order to respect both aims and avoid a collision between them or the predominance of one to the detriment of the others. However, the definition of the concept of 'rational clarification' presents him again with the problem of the inconsistency between the scientific and instrumental aims of the social sciences, since they rest on different conceptions of reason.

It has already been said that in those years

³²*Ibid.*, p. 24.

³³*Ibid.*, p. 82.

he placed great trust in the role that science could play in human life, asserting that it is built by means of a 'method' and an 'attitude' based on a conception of reason which he calls 'formal'. The sole aspect of this conception which he rejects time and again is its 'neutrality in terms of values', because that decisively affects the instrumental possibilities of scientific knowledge. What is the purpose of the rational clarification of science if it does not provide guidance concerning what must be done? However, and here is the problem, the establishment of a normative science is based on a conception of reason which is different from, and often opposed to, the formal conception.

In a rather simplistic way it can be said that this is a distinction between material (absolute, total, dialectical, critical, objective, substantial, etc.) reason and formal (relative, partial, instrumental, subjective, etc.) reason.

The conception of material reason holds that it is a "principle inherent in reality" (Horkheimer), and accordingly exists not only in individual consciousness but in the natural and social objective world. The proper use of his rational capacity enables man not only to gain knowledge of the 'genuine being', the 'real nature' of things, but also to obtain the criteria which will enable him to guide his conduct properly. To act in a rational manner means to do so in harmony with that broader order in which man and his purposes are included. This conception originated with the Greeks, who were dazzled by the possibilities offered by the Socratic discovery of the 'concept', was strengthened with the Renaissance discovery of the 'experiment', received the support of the major part of the rationalists and continues to the present day in the widest variety of forms, including those rooted in utilitarianism and Hegelian marxism.

The conception of formal reason also maintains that it can play an important role in human life, although much more limited than that implied by the first conception. Formal reason, conceived as the subjective capacity of the intellect, can help us to dominate the natural and human world, to select in the most appropriate way the means of attaining the ends we have set ourselves, to foresee the conse-

quences of our actions, to clarify what are the values or the conception of the world which guide our actions, but it will never permit us to learn the 'meaning' of the world in which we live, not its genuine nature nor will it be able to indicate to us what we should do. 'Objective' knowledge, the 'absolute' truth, the 'essential' reality, 'correct' values are elusive, timid creatures which can never be completely pinned down by formal reason. Although its background is also longstanding, this school has its theoretical foundation in the illuminists, Hume and Kant and extends as far as to predominate in the present philosophy of science.

It would be a profound mistake to believe that these conceptions of reason are merely responses to philosophical subtleties which could be left aside; on the contrary, they express a problem of considerable political importance, which stands at the focus of all contemporary doctrines and closely links the philosophy of science with political ideals.

It is clear that Medina fluctuates between them because, while the second conception seems to him to be the appropriate foundation of the scientific nature of the social sciences, the first is the appropriate foundation for its instrumental nature. And this latter nature, in the full meaning in which he uses it —of guidance for the proper organization of human affairs, for a reconstruction of human coexistence— cannot be reconciled with a scientific reason which 'abstains' at the level of values, which does not clearly indicate which are the decisions which should be taken, and which can only achieve relative and provisional knowledge.

It has always been evident that the conception of material reason underlying the instrumental character which Medina demands from the social sciences is closely linked to political doctrines which firmly aim both at the upholding and at the transformation of a given *status quo*. The names of Plato, Hegel or Marx are sufficient examples. In these cases, political doctrine demands the legitimacy supplied by the possession of the absolute truth and, if the foundation of this truth is reason, use will be made of a philosophy which ensures that reason provides the means of attaining that

truth, from which is derived not only objective knowledge of reality but also the principles for guiding action. How can one firmly justify doctrinaire principles if one is not certain of possessing the truth? But of course, if the common epistemological derivative of this conception, which believes that it can reach absolute truth, is dogmatism, then its political derivative—or antecedent—is absolutism: if the proper use of reason makes it possible to possess the truth, why should it not be imposed on others, who, guided by their interests or blinded by ignorance, do not wish to see it as it is?

The conception of formal reason is strengthened in the fight against dogmatism, which always lies in ambush for material reason, and offers a path of tolerance and effort to reach a provisional truth by means of experience. Formal reason opposes innate ideas, revelation, self-evident principles, and the predominance of experimental reason. However, this conception has an obvious 'elective affinity' with certain political doctrines, especially some modern varieties of liberalism, which limit the political action which can be carried out to the strict limits of the provisional truth supplied to us by scientific reason. Science can in no case tell us what we should do, since this decision belongs to the specific area of human liberty; it can only indicate to us what we can do. However, this indication is also very limited, because of the provisional and relative nature of the knowledge which scientific reason can provide. If through it it is only possible to attain a very fragile truth, it will never be possible to hold that there is a scientific basis for a political strategy of large-scale transformation. In such circumstances, the rational or scientific management of human affairs should be limited to the application of very restricted social engineering. Years after the first works of Medina, K. Popper highlighted with his political proposals the close relationship which exists between an epistemological conception based on formal reason and moderate political doctrines. This conception represents an effort to limit the harmful political effects of the excesses of material reason—whose supreme example is 'terror'—and to legitimate scientifically a latitude for action which is important for human liberty,

but rapidly slips towards the implicit defence of the *status quo*.

Both conceptions of reason have their virtues and defects when they are conceived as cognitive and political principles. Formal reason is a dissolvent of all kinds of dogmatism, at the same time as it helps man to reach his goals, but on the plane of values and of ethical and political decisions it forbears, giving precedence to the free expression of will. This 'neutrality in values', which for its adherents is a guarantee of freedom, is for its critics its fundamental defect, since it implies retreating before the decisive problem of the choice of ends and leaving the way clear not for liberty but for irrationalism or technocratism. Whoever, like Medina, has watched the spectacle of groups and classes destroying each other because of their incapacity to reach agreement on the ends to be pursued—as in the case of the Weimar Republic and in that of Spain at the time of the civil war, to cite only two examples which weighed heavily on him—or the sight of intellectuals refraining from offering solutions, protected by the neutrality in values of formal reason, can have no doubts about the danger of conceiving it to be the only type of reason possible. When the free expression of individual interests leads to social harmony, in accordance with the beliefs of the original economic liberalism, all that is needed is formal reason to enable men to attain as efficiently as possible the ends which they have freely proposed; but when the conflict of individual and social interests leads not to harmony but to chaos and anarchy, formal reason shows that it is not the appropriate instrument for overcoming the crisis of the liberal democratic régimes.

Again and again, in various forms, the conception of material reason recurs in western thought to fill the tremendous void left by formal reason. Its greatest promise lies in bridging that gap satisfactorily, but its critics do not fail to point out that always inherent in it is the very danger which it was the function of formal reason to avert: material reason might mask behind an appearance of rational or scientific knowledge what is in fact the product of mere irrational and interested decisions. The history of the past and present forms of totali-

tarianism, with their pseudo-scientific doctrine in which they seek justification, is the supreme endorsement of an attitude of the utmost caution to the spread of material reason.

In his first period, Medina sets out the differences between the scientific and instrumental requirements, but does not succeed in combining them satisfactorily. When it was pointed out to him —by José Gaos, for example— that the predominance of rationalist determinism would lead to automatism and the suppression of freedom, he took refuge in formal reason and replied that "...since the exhaustion of the scientific fetishism of the nineteenth century, present-day science offers no grounds for maintaining pretensions to absolute knowledge ... Science was the first to be converted to historical reason; but it saves its relativity in the test of experience".³⁴ There is no reason to fear that knowledge of the social sciences will threaten freedom, since 'it is not thus that God punishes us'; the problems do not derive from the scientific nature of the social sciences, but from the absence of such a nature. Ideally, science should offer us the solution to our problems, since "rationalism and humanism are so intimately united that science would lose its *raison d'être* if it abandoned all hope of one day rationally governing our social life. However, in its present state sociology cannot completely fulfil this assignment, and we must content ourselves largely with demanding from it and the social sciences the fullest possible rational analysis of the conditions of our action".³⁵

However, these favourable assertions *vis-à-vis* formal reason do not leave him satisfied either, and consequently Medina returns to them repeatedly in his later writings and reformulates his considerations concerning the problems of reason on the basis of a clear distinction between formal and material rationality. He concedes that, in a strict sense, and in accordance with the prevailing philosophy of science, scientific reason is only formal rationality, and accordingly the moment of the decision which involves values —the choice

of what must be done— remains outside the sphere of science. Nevertheless, it is not beyond the limits of reason, since it is susceptible or rational interpretation by material reason. Paraphrasing the aged Mill, M. Weber said that when emerging from pure empiricism one falls into the polytheism of values, and a struggle among the gods is then inevitable; but Medina becomes progressively convinced that the only way of avoiding this struggle is the proper use of material rationality.

In accepting that 'values' and 'meanings' are susceptible of material rational analysis —if not, how could one determine which problems are socially important and which are not?— Medina moves away from the neo-positivist positions he held in his early writings and moves closer to the 'critical philosophy' of the Frankfurt school. To grasp the meaning or value of a social action is not the same as agreeing with the manifest meaning expressed by the actor, nor agreeing to place this action in the manifest social whole of which it is part. Rather, it is necessary to use the critical battering ram of material reason to penetrate through the layer of rationalizations and ideologies until one reaches the profound meaning which guides the social action. Material reason and critical reason appear in Medina's mature thinking; here he not only continues to recognize the achievements of formal rationality, but also acknowledges its limits and above all the danger that formal rationality, after the fact has been separated from the value, the theory from the decision, and after the choice between values has been placed in the sphere of irrationality, may occupy with its own peculiar values —especially that of 'effectiveness'— the gap left by material rationality. Already, in 1969, he points to the danger of the destruction of any form of reason when "it goes beyond the field of its effective potentiality",³⁶ and in his last essay he reiterates that the "revitalization of democracy" depends to a large extent on a will "to transcend instrumental rationalism and once again found the legitimacy of democratic rule on the supreme values of a form of human

³⁴"En busca de la ciencia del hombre", in *Responsabilidad de la inteligencia*, op. cit., p. 31.

³⁵*Sociología: teoría y técnica*, op. cit., p. 74.

³⁶"La planeación en las formas de la racionalidad", in *Sociología: teoría y técnica*, op. cit., p. 100.

society which has a real significance for man and his community".³⁷

In short, as regards the possibility of a 'rational policy' it is clear that Medina always sought, through all the forms of rationality, the most appropriate means of rationally guiding conduct. At the outset he placed his trust in the rationality of science; later, when he recognized the limits of that type of rationality—its inevitable 'neutrality in value'—and the dangers of its excesses, he endeavoured to integrate it with material rationality, in order to find a setting which afforded scope for rational discussion and agreement, not only on the formal relation of means with ends, but on the ends themselves. However, when he turned

to material reason and the analysis of the social conditions in which it can exist and develop, he knew that he had come to the very heart of his own cognitive and political utopia. The rational conduct of human affairs is possible by means of formal and material rationality—in other words, rational decisions can be reached on the technical and political levels—but it is indispensable to create such social conditions as will permit the deployment of both rationalities. In the absence of these conditions, and despite all Medina's efforts and hopes, there will be 'no ebbing of the towering wave of irrationality that is engulfing us', since the destiny of democracy is one with the destiny of reason.

II

In search of the object of sociology

Even a superficial reading of Medina's initial works clearly indicates that they are devoted to justifying and firmly defending the scientific nature of sociology and clarifying its object of analysis. Unfortunately, this is not a discipline which has an object and a method which are consolidated and accepted, but one full of academic and ideological conflicts.

For this reason his task consists not in moving forward easily along the path built by his predecessors, but in overcoming with difficulty a dense theoretical and methodological tangle in order to establish firmly the essential foundations for the development of a rigorous social science: the appropriate use of the scientific method and the precise delimitation of its object. Without doubt it would have been easier for him to accept from the outset some particular theoretical position, without asking it or himself bothersome questions concerning the philosophical assumptions on which it was based; but such super-

ficiality was not compatible with Medina's temperament, nor with the principles which, in his view, define the task of an intellectual. He had to select the most correct 'solution' only after a thorough exploration of all the options open to him; each of them had to be analysed and evaluated in order to grasp and retain its positive aspects. This process of analysis and evaluation obliges him to go deeply into philosophical labyrinths from which it is difficult for him to emerge unscathed, as has already been pointed out in the previous chapter devoted to outlining the foundations on the basis of which Medina affirms the scientific nature of sociology.

The task is difficult both for him and for anyone who proposes to follow the evolution of his thinking closely and in detail, since in this explanatory process it is possible to lose one's bearings, devote part of the time to penetrating along paths which turn out to be dead ends, or to allow oneself to be guided by brilliant lights which prove to be mere will o' the wisps. All this happens to Medina while he is seeking the object of the social sciences, and since this search is reflected in his writings, they can prove tiresome for anyone who

³⁷"Notes on the future of the Western democracies", *CEPAL Review*, N.º 4 (second half of 1977), p. 134 (United Nations publication, Sales N.º: E.77.II.C.5).

is not determined to travel together with the author along the winding road. Furthermore, since he is subject to various influences, and his intellectual honesty and scientific zeal always prompt him to set out all those which he deems important, some of his texts can give the less alert reader an impression of tiresome erudition.

After analysing the problems relating to the scientific nature of sociology set out above, Medina devotes the first stage to clarifying the scope of the social sciences and precisely outlining the sociological perspective. He begins this work in a systematic way in the mid-1930s—his first sociological work had already been written by 1936—continues moulding his ideas through books and articles during his stay in Mexico, and shapes them finally—as far as this subject is concerned—towards the end of the 1940s in his *Lecciones de sociología* (Lectures in sociology) given at the University of Puerto Rico, of which only an incomplete typed version exists.

It has already been mentioned that because of his character, open to any useful contribution, he is subject to many influences from different ideological or academic backgrounds. It seems clear that even in the initial years he is influenced by some authors from Germany (M. Weber, K. Mannheim, H. Freyer), France (A. Comte and E. Durkheim), England (H. Spencer and M. Ginsberg) and North America (J. Dewey, F. Znaniecki and T. Parsons). His mature version of the sociological perspective basically consists of a combination of various European schools of thought, especially the Weberian school, with contributions from the North American school, the latter no doubt analysed in detail during his stay in Puerto Rico between 1946 and 1952. As is well known, this theoretical combination has not been attempted only by Medina, since various thinkers, each in his own way, have endeavoured to follow the same path, among the most outstanding examples in the United States being T. Parsons, C. W. Mills and R. Bendix. Parsons' influence on Medina is obvious—at least in the 1950s—but as far as the others are concerned, there seems to have been, rather than a direct influence, the affinity typical of the members of a single school of thought.

Social facts: action and situation

1. A clear idea can be gained of Medina's conception of the object of the social sciences if his basic assumption is followed through from the beginning: just as all the social sciences make use of the scientific method, they also share a single object—'social reality', 'social facts'—although they differ in the type of social facts with which they deal and/or the perspective from which they study them.

But what does he mean by social reality, social facts? Basically these are human activities, actions, behaviour, by men who act in various ways; in short, a "fabric of human acts with their antecedents and results".³⁸ These human acts, therefore, do not occur in a vacuum but have as a framework and influence 'antecedents' of various kinds and, in addition, generate as a product of their own development 'results' which can be transformed into the conditions for new actions. However, in his first writings he emphasizes that the nucleus of social reality, human action, must be distinguished from its antecedents and its results, and firmly rejects all conceptions which claim to 'reduce' such action to the latter.

'Naturalist reduction' asserts that social facts are natural phenomena which can be grasped with the conceptual instruments of natural science and, therefore, that the social sciences are natural sciences. This conception has a number of variants depending on the natural phenomenon in which it is sought to blend the social fact; the most widespread include those where human behaviour is a manifestation of the organic constitution of man, an expression of instincts or tendencies which constitute his dynamic principles; and those which consider it to be a consequence of the natural or physical environment.

The 'culturalist reduction' regards the social fact as 'cultural' or 'spiritual', as a manifestation of culture or of the spirit. This conception also has a number of variants—historicism, Hegelianism, phenomenology, and so on—which postulate the existence of totalities of meaning, manifestations of the objective spirit or spiritual essences such as

³⁸*Sociología: teoría y técnica*, op. cit., p. 56.

art, law or morals, and *imagine them as abstract, closed and independent entities.*

Medina rejects both reductions. It is undeniable that human beings are one with their 'animality' and for that reason are subject to tendencies similar to those of other species, but human action includes something more than the natural conditions in which it is carried out. It is also true that man is imbued with or influenced by culture, and that the expressions of culture can be 'grasped' from the society in which they arose and can be conceived as more or less consistent, ordered and independent wholes. However, here too it should not be forgotten that they are human products and that what is important for the social sciences is not these cultural entities in themselves, but the activities by means of which they recreate and actualize themselves, taking form in human behaviour. The 'culturalist reduction' tends to "cut off culture from its vital roots, then bring man face to face with it and finally, very often, attribute to any one of the cultural products a decisive power over man himself".³⁶

It is true that natural and cultural elements are so interlinked that it is often possible only to differentiate them analytically; the origins of many cultural expressions can be traced to their natural basis, while many manifestations of internal and external nature are mere by-products of culture. But human activity cannot be reduced to either, or to any combination of the two. The irreducible nucleus of action by man is the action itself—with its content of intention, purpose, aim, meaning—and those antecedents and results are only stimuli, means, obstacles to it.

Time and again Medina reiterates that to a large extent man—conceived generically as a species—creates himself by constructing through his activities the circumstances which influence his behaviour. Accordingly the approach of the social sciences should analyse how natural and cultural conditions mould human behaviour, and also how man uses these conditions—within the framework of his specific society—to achieve the aims he has

set himself or chosen, since it is through this choice that he can express his relative freedom from these conditions.

Human activity is included in physical and biological nature but transcends it because of its 'meaning', whose importance is not perceived by naturalism. Culturalism, for its part, crystallizes, 'substantializes' this meaning, without pointing out that social reality is activity and not crystallized culture. Nature and culture are components of human activity, but the nucleus of the latter cannot be understood through the separate consideration of its components, nor through the exclusive analysis of its products or results.

The conception formulated by Medina in his first sociological writings on social facts is clarified when it is compared with those of M. Weber and E. Durkheim. The former holds that the specific object of analysis in sociology—in sociology alone, and not in the other social sciences—is 'social action'. Taking the total set of human actions he establishes a distinction between actions with meaning and behaviour which represents a mere reaction. Actions with meaning are those to which the actors carrying them out give an orientation in accordance with certain criteria or principles (which are not necessarily nor usually ethical), while reactions are mere responses, largely automatic, to internal or external, natural or cultural stimuli. Among actions with meaning he distinguishes social action, which are those where the meaning granted to them by the actor relates to, or takes into account, the actions of others. In other words, a social action is not a mere reaction to internal or external stimuli, but has an orientation, a meaning, which takes into account the actions of others.

Medina agrees with Weber that actions with social meaning—i.e., those related to the behaviour of others—are the nucleus of sociology (and, in his view, the other social sciences), but does not follow him in the sharp distinction he proposes between actions with meaning and reactive behaviour, or, as a result, in a sociology which leaves aside consideration of the natural conditions of human action. In other words, while he does not agree that human action should be reduced to its natural basis, nor does he feel that it is desirable that

³⁶*Ibid.*, p. 6.

the latter should disappear from the analytical perspective of sociology.

According to Durkheim, in all spheres of human activity there are 'social facts' which are the subject of sociology—customs, practices, habits, conventions, legal norms, ways of acting, thinking and feeling, and so on—and which are objective in nature, that is to say, exist independently of the individual and, to a large extent, are imposed on him. These social facts possess an 'objective', 'real' nature; they have been created by man but have become independent of him and assumed their own existence. To man they appear as 'objects', with their particular nature, their internal logic and their imperative character, especially when they have reached a high level of consolidation, as occurs with language or legal norms. They are not 'material' facts like natural facts, but they are just as real; and they are not human action, although they manifest themselves through it.

Where Medina differs from Durkheim is clear: for the latter social facts are the consolidated 'institutions' in which human activity takes place, while for Medina they are human action itself, the actualization of those institutions.

2. As early as in his first book, when trying to encompass in a single term the particular features of social facts—and especially how they differ from natural and cultural facts—Medina terms them 'forms of life'.⁴⁰ The echoes of E. Spranger in this term do not appear to be accidental, since that author also seeks to establish a degree of order in the multiplicity of individual forms of behaviour through the construction of ideal types of 'men'—theoretical, economic, political and so on—which characterize their conduct through the predominance of one given orientation of meaning and value.

Medina indicates some characteristic features of these 'forms of life', which differentiate them from natural and cultural facts. It is true that they are less consistent than the latter, but they have a characteristic internal

nature. Natural and cultural objects are 'external' to human beings, but social facts are "specific modes adopted by existence in realizing itself", and they cover all human life because "they would have no existence without us and we would have no reality without them". We cannot stand outside them and observe them as if we were observing a storm or a picture, and for that reason they form a 'vital reality' which is the object of 'continuous human execution'; their destiny is linked to the destiny of men, and "The forms [human activity] takes are forms or modes of human life itself".⁴¹

However, it should be mentioned that his formulation of social facts varies over the years; this is not surprising, since he analyses this subject in writings ranging from 1936 to 1955. The formulation outlined above corresponds to that of the first works, between 1936 and 1941, and there one can clearly see his eagerness to prevent the social sciences from being devoured by some of the naturalist or culturalist 'reductionisms' so prevalent at that time. Although he indicates the important influence of natural and cultural 'conditions' on social action, the impression sometimes remains that he focuses less interest on them because he highlights the specifically social component, human behaviour, always in action, *in fieri*.

In subsequent writings he continues to affirm the creative and innovative persistence of human activity, but devotes much more space to the conditions which guide it and restrict it, and also makes much more frequent mention of Durkheim and his insistence on the imperative nature of these conditions. For example, in his *Lecciones de sociología* of 1948 (p. 36 *et seq.*) he reformulates the conditions of human activity with his concepts of mentefacts, artefacts and sociofacts.⁴²

⁴¹*Sociología: teoría y técnica, op. cit.*, p. 59.

⁴²Mentefacts are the products of thought, especially ideas, which appear in the form of objectified and instrumental symbols; artefacts consist of anything which man has made with his hands, from the simplest tools to the most complicated machines; and sociofacts are the "constructions of social coexistence", everything which constrains behaviour, from the most elementary customs to the most complex institutions. They are all creations of man which

⁴⁰*Panorama de la sociología contemporánea* (La Casa de España en México, Mexico City, Fondo de Cultura Económica, 1940), p. 208 *et seq.*

Even in that text, and more clearly in another written in 1955⁴³ he modifies the meaning of his concept of 'forms of life' to include not only human action but also the conditions in which it is carried out. These cultural, material and social conditions are the components of the forms of life which shape human conduct by their compulsory nature. In addition, there are forms of life which are total—those which are specific to the various types of civilizations—and partial, which correspond in particular to the various social institutions and roles prevailing in a given society; analysis of the latter was later to constitute one of the favourite subjects of analysis in his sociology of development.

At all events, whatever emphasis Medina deemed it advisable to place on analysis of the conditions at various stages in the evolution of his thinking, there is no doubt that he always regarded action, 'social behaviour', as the central nucleus of the object of the social sciences.⁴⁴

3. 'Social facts' are never finally facts but have to generate themselves every day in the repeated acts which give them reality. But this does not prevent them from occurring in a relatively ordered form; on the contrary, they present 'forms' whose consistency derives from the various meanings of the action. If the nucleus of social facts is made of activities with meaning, the various meanings of the

action are also the criteria on the basis of which the various types of social facts, the different forms of life, are differentiated.

Medina distinguishes two aspects in the orientation or meaning of actions, which constitute an essential foundation for his conception of the object of the social sciences. The various types of action can be differentiated according to their content or purpose—for example, economic, political, religious, military, and so on—and by the mode or form in which they are carried out (for example, rational, traditional, affective, and so on). Medina finds in the first of these criteria the key which enables him to distinguish the various spheres of ordered human activity.

In other words, the individual social sciences concentrate on the study of special types of social action differentiated by their aim or content. Economics analyses those activities of man which are aimed at satisfying his material needs; political science those which are aimed at meeting requirements in organization and control; and similarly for the other individual disciplines which "set out a list of issues focused around a particular type of human action".⁴⁵

Analytical sociology and concrete sociology

1. But what is the specific object of sociology?

This question is usually given three typical answers which are not necessarily mutually exclusive: firstly, sociology might attempt to define its object by delimiting a range of activities characterized by their 'social' purpose, in contrast to those which have economic, political or other purposes; secondly, it might focus on the study of a formal aspect or dimension present in all human activities, whatever their purpose; or, finally, it might claim that its object is the overall social structure involving the partial spheres to which all the individual social disciplines relate.

Medina rejects the first answer and, following Mannheim, holds that sociology constitutes its object on the basis of the perspectives implied in the two remaining replies;

exert a wide, changing and omnipresent influence on his behaviour.

⁴³"Tres aspectos sociológicos del desarrollo económico" (1955), in *Aspectos sociales del desarrollo económico* (Santiago, Ed. Andrés Bello, 1955), p. 82 et seq.

⁴⁴In his *Lecciones* he once again emphasizes this subject with particular brilliance: "...from the perspective of life in general man appears to us as a being in a situation. And from this situation, for which in principle he is not responsible, he can only escape in order to fall into another". But this situation "is in addition something open and unfinished, movement within the movement, the present moment of the history which we represent. Thus we make our history within the history which has made us... Within the limits of this fate, within the framework of this situation, however, operates the freedom which makes us what we are and shapes and modifies the situation itself. It is a creative liberty, it makes our personality, society, history; but it is not an unlimited and omnipotent freedom, for it can never go beyond its situation". *Lecciones de sociología*, (mimeographed version of his lectures at the University of Puerto Rico, 1948?), pp. 189-190.

⁴⁵*Sociología: teoría y técnica*, op. cit., p. 92.

in other words, it is at once 'analytical' and 'concrete'.

However, these concepts require clarification. Taking one step beyond what has already been said in the previous chapter, and interpreting to some extent Medina's implicit thinking, we may assert that these concepts are located in an area crossed by two fundamental dimensions. On the one hand, the approaches vary with the level of abstraction (or concreteness) used: there are approaches, concepts and theories which are 'general' in that they refer to phenomena characteristic of any human society; 'typological' in that they endeavour to grasp social facts which are specific to certain types of society, such as, for example, the peripheral capitalist societies; or 'individual' in that they are interested in phenomena belonging to a given society. On the other hand, the approaches also vary with the unit of analysis regarded as appropriate: in this case they range over the broad area extending from 'micro-social' analysis of social actions and relations at the interpersonal level to the 'macro-social' study of broader formations—groups, institutions and their relationships—at the structural level. Medina makes many of his methodological considerations by taking as a reference the extremes of this combined classification: the general and interpersonal approach, which he usually simply calls analytical, and the historical and structural approach, which he usually terms concrete.

Analytical sociology has a twofold attraction for Medina: its constituent elements are a necessary condition for any theoretical formulation, so that the effort devoted to them is never wasted, and, moreover, how elegant their conceptual constructions are!

When in *Panorama de la sociología contemporánea* (p. 203 *et seq.*) he reviews the analytical perspective, he does so on the basis of the thinking of G. Simmel, one of the most energetic builders of this theoretical path. Simmel reacts against the encyclopaedist tendencies of many classics in the discipline, defines social facts in a 'special' and not 'total' way, and opposes the theory of socialization to the theory of society. He does not try to find a new object for sociology, but sets out the

sociological perspective on the basis of which it is possible to analyse the objects already investigated by the other social disciplines. He believes that he can find this perspective on the already outlined separation between the 'content' or purpose of the action and the 'form' or mode in which it is carried out; sociology should study the forms assumed by human action, whatever their content—in short, devote itself to analysis of the 'forms of socialization'.

Subsequently, in *Sociología: teoría y técnica*, Medina returns to the subject when assessing the contribution of F. Znaniecki. This author maintains that, while each of the individual social disciplines has its own sphere, there exist similarities of structure between them which derive from the fact that all study human action, and, for that reason, a discipline is needed which formulates a general theory of action. For his part, Medina emphasizes: "...beforehand, and as a foundation for the detailed research undertaken by the individual social sciences on the various classes of action, it is possible and necessary for someone to study social action in itself and construct its theory",⁴⁶ and this someone is the analytical sociologist. All the individual social sciences formulate their theories on the basis of assumptions relating to human action—thus they postulate the existence of 'economic man', 'political man', and so on—which may not be valid or acceptable, and must therefore be analysed by this general theory of action or analytical sociology.

In Medina's view, this sociological perspective offers an important point of departure for understanding of the social world, but does not exhaust the role that sociology can play, since it is not capable of overcoming all the shortcomings of the partial viewpoints of the individual social sciences. These sciences "work with their backs turned to the situation as a whole, on the basis of artificial constructions imposed by their fragmentary point of view".⁴⁷ The 'special' actions which they study imply abstractions in a dual sense; on the one

⁴⁶*Ibid.*, p. 93.

⁴⁷*Ibid.*, p. 96.

hand, there is a single answer of the actions who, although he pursues different purposes, is an indivisible 'person'; on the other, whatever the special purpose of the action, the overall structure in which it is carried out has a decisive influence on it. For this reason, in order to understand a social action it is necessary to know the relationship it has with other actions and with the whole —person, institution, group and social structure— within which it is included. A discipline is required, therefore, which succeeds in achieving a perspective of the whole, which studies society as a whole, and which does not claim to expel or replace the other social sciences, but makes use of them: *this* is concrete sociology.

To use the terminology which Albert O. Hirschman popularized with another theoretical aim in view, the sociological perspectives which Medina suggests have 'forward' and 'backward' linkages with the other social sciences, since on the basis of the materials which the latter provide, they help then to revise their assumptions and achieve a synthesis of their findings. The sociological view is always a cross-section, since it penetrates through the other social sciences and brings them lines of contact at the base and the peak of their theoretical constructs.

Sociology needs both the analytical and the concrete perspective, but the latter is 'its only *raison d'être*'. Medina underlines that this concreteness was imposed on sociology at its origins by Comte. For Comte social reality is a whole —a set of interdependent parts which cannot be understood in isolation, but only in the totality of their mutual relations— that has a historical nature which must be respected in the theoretical perspective with which it is tackled.

2. In the *Lecciones de sociología* he prepared in Puerto Rico, Medina presents his analytical sociological theory, made up of a set of general and systematic concepts.

After his long preoccupation with social action it does not seem strange that he should construct his analytical sociology on the basis of it, since he regards it as the "irreducible unit" of social reality. As a result, on the basis of social action and following the main thrust of the Weberian orientation, Medina puts in

place the fundamental parts of a theoretical edifice the culmination of which highlights the concept of social structure. In this way, between the tiny individual social action and the overall structure of society are found all the concepts which, intertwined, make up his analytical sociology.

Nevertheless, it could be argued with justification that he might well have chosen the reverse route, and begun his analysis on the basis of the concept of social structure, so as to highlight conceptually the predominance of structural over analytical sociology. However, either from pedagogical necessity, or because he wished to follow the example of his teachers M. Weber and G. Simmel, or because he was dazzled by the architectural elegance of his constructs, he did not begin with the whole, but with the most elementary unit and, furthermore, spent much time on analyses which are very suggestive, but also rather formal and abstract, in the best style of the second of the teachers mentioned.

At all events, compared with previous examples his exposition is more rigorous and systematic, and it is possible to draw from it, without major difficulties, the fundamental concepts with which he formulates his sociological theory and whose understanding is undoubtedly indispensable in order to tackle his sociology of development.

After defining *social action*, like Weber, as that action whose meaning is related to the action of others, he distinguishes within it two basic components: the *actor* or person who carries out the action, and the *social situation* in which it is carried out.

There are only two types of actors or units of action, *individuals* and *groups*. Individuals are by their very nature subjects of action, since they alone possess corporeal reality, awareness and will, but groups also have a specific reality, which can be grasped empirically. This reality of the groups derives from the fact that they are collective units of action which carry out in an articulated, organized manner activities that cannot be carried out by individual action.

The actions carried out by these individual and collective units are usually not chaotic and disordered but, on the contrary, are characterized by their uniform and continuous repeti-

tion over time. This characteristic of social actions derives from the circumstance that the actors conform to a greater or lesser extent to behaviour patterns which they find already formed in their society. In his social situation the actor encounters *normative orientations* which indicate to him both what he should do (purpose of the action) and how he should do it (technical orientation of the action); *conformity* expresses acceptance of and compliance with the normative orientations of the social 'models' of action, and is in turn the basis for the *social cohesion* which is manifested in the fact that all actors share in the common meanings, ends and values, and in the force of the links which unite them.

The fact of conformity is central in the sociological perspective, since it is the principal link between the actor and his situation, and its influence is so profound that not only is man moulded by society, but in most cases freely accepts such moulding.

The conformity of the actors with their normative orientations is produced by two fundamental factors. Firstly, by *social pressure*, which like atmospheric pressure is imperceptible, widespread, constant; its contribution is culture, and its constituent elements the *mentefacts*, *artefacts* and *sociofacts* already mentioned. Secondly, by *social control*, which is perceptible, specific, deliberate; it requires organs and instruments for its application, and its support is power.

The normative orientations which mould the activity of the individual and collective units of action together form a sort of *overall normative order*, but are also, at a more limited level, grouped into two 'units for normative co-ordination of action': the *roles* and *institutions* which give the normative orientations a specific shape.

The roles are sets of normative orientations which refer to a social activity or position and therefore determine a given series of rights and obligations. The institutions are units of co-ordination which shape large areas of activity; they are not units of action, as is sometimes thought, but the units of action act within their framework, in conformity with their 'institutional patterns' (economic, political, educational, and so on). The concept of a

role is of central importance in this perspective, because not only are the institutions sets of organized roles for the achievement of a given collective purpose, but in addition these constitute the basis of the notion of a *person*, i.e., the individual conceived as the support for a set of social roles.

So far all the concepts highlight the influence of the normative orientations on behaviour; Medina holds that this is the typical sociological perspective, theoretically very fruitful but also very incomplete. Of central importance for his perspective is the idea that social phenomena are strained by opposing trends, are subject to 'polarities' which cannot be resolved dialectically but may at best reach a balance among themselves. It is the already mentioned interaction between action and situation. Both trends are always necessary; without conformity societies dissolve, but without nonconformity there is no development or creation. The same occurs with the tendencies present in any individual: the 'moulded ego' adapts and conforms to the prevailing order and is a reflection of its situation, while the 'innermost ego' rebels, innovates, creates. On the level of the relationship between units of action and co-ordination, therefore, there exists a dual trend towards conformity and rebellion which is one of the nuclei of Medina's theory.

He adopts a similar position when he analyses some of the basic social relations between the actors. As a backdrop to all the most concrete social relations and an irreducible component of any form of coexistence stand *concord* and *discord*, which emerge as an expression of the human passions and demand the formulation of a sociology of affective life. At a more concrete level he sketches, in often brilliant pages, some oppositions which are manifested in classical social relations: *contact* and *isolation*, *competition* and *co-operation*, *authority* and *obedience*, differences between types of *status* and *between the social strata*.

These social relations represent the social fabric, the threads with which men weave and unravel it, because the 'brilliant tapestry' of the historical process always shows on its reverse side the humble and patient fabric of

everyday actions, and they may be viewed from a dual perspective: as 'processes' which unfold over time, or as 'structures' which are the consolidated result of this unfolding at a given moment.

It has already been said that Medina, for various reasons, notably the attraction exerted by the elegance of strict concept and architecture—as happens to many economists with neo-classical thinking—analyses and appraises the contribution of the interactionist school which concentrates on the analysis of social relations at the interpersonal level. But he points out that sociological theory cannot stop there and must turn to the study of the collective units of action and the institutions, for only through them can the *social structure* be observed. On the one hand, he asserts that the "physiognomy of a given society depends on the character of its predominant, axial groups";⁴⁸ the internal organization of these groups—their values, norms, means, distribution of functions and roles—and their relationships are an essential component of the social structure. On the other, the institutions constitute the broader 'structural setting' of any society. It is true that this institutional perspective should be used with caution, since it can lead to a very general and abstract approach or to a mistaken reification of the institutions—problems which functionalism has often not been able to overcome—but it also possesses major virtues because of its structural nature.

In his subsequent studies on the sociology of development Medina was to examine more thoroughly both the groups and the social roles specific to the economic institutions and, in particular, was to explore the relations between the economic institutions and political and educational institutions.

Finally, there is a last aspect of his analytic sociology which should be highlighted because of its influence on his sociology of development. It has already been mentioned that, for him, social actions usually include a dual orientation concerning both the purpose of the action and the way in which it is carried

out. In this latter orientation one may distinguish some classical types, such as rational action and traditional action, which can be the foundation for different types of conformity and therefore of different types of cohesion and social structure.

When instrumental rational action predominates, where appropriate, means are applied to achieve a previously chosen end in the most efficient way, this gives rise to cohesion based on consensual agreement, on the interrelationship of interests, which generates a social structure made up of a fabric of instrumental actions where the segmentary interests of its members are grouped and related.

When traditional action predominates an activity is reproduced without selection of means or ends, which does not seek to gain a benefit or satisfy an interest but merely to 'repeat a custom' or 'maintain a tradition'. Traditional cohesion is based on custom, solidarity and emotion, and the predominant relationships in the social structure are of the *gemeinschaft* type.

Concerning these types of articulation of human activities—which range from the interpersonal social relationship to the overall structure of society—two approaches have arisen, both of singular importance in the sociology of development. On the one hand, there is a formal and unhistorical approach which analyses the nature of any social fact on the basis of these types and, on the other, a historical approach which conceives the two types as successive phases in a transition from the *'gemeinschaft'* to the *'gesellschaft'* society or, as Medina was to put it later, from the traditional to the industrial structure.

3. In his *Lecciones de sociología* Medina accordingly constructs the complex analytical edifice which is founded on social action and culminates in the social structure. This sociological approach is an indispensable means of studying any society, since it provides the 'framework of concepts' which makes it possible to 'grasp reality'. "For while the concepts are never the reality—which goes far beyond them in its richness—reality would escape us if we did not possess them."⁴⁹

⁴⁸*Lecciones de sociología*, typed version referred to above, p. 134.

⁴⁹"Proyecto de un curso", in *Presentaciones y Plan-*

Nevertheless, it is worth repeating that, in Medina's view, the analytical perspective is insufficient to satisfy the aspiration of sociology, even when the preeminence of the structural approach over the interpersonal approach is emphasized. Sociology has the duty of providing guidance for human action, and for that purpose it must be not only structural but also concrete, historical. The general concepts of analytical sociology must be the foundation for the typological and individual concepts of concrete sociology, since the former, left to their own devices, are empty and formal, mere elements in an abstract sociology which is no use in providing guidance.

It has already been mentioned that the typed version of Medina's *Lecciones* includes only his analytical sociology, and even then incompletely, but in his inaugural exposition in the general social science course in Puerto Rico—which appears in "Proyecto de un curso"—he clearly outlines the general framework within which it falls, the purpose which guides it and the various parts which go to make it up. The basic purpose is to encourage the students to be aware of the world in which they live, to understand the reality which surrounds them and the causes of it, and to make this awareness the point of departure for the development of their personalities.

In order to achieve this aim he divides the general social science course into three parts.

The first is devoted to analytical sociology, as has already been outlined, which in this case he calls 'theory of society'. In the second part he sketches the type of historical society 'in which we are immersed' and which he calls 'liberal society'. In this outline he presents "what has been and remains that organization, that way of seeing and living life, ...how such a type of society arose and what has been its growth, what thinking shaped it or expresses it, how and in what form it then enters into the situation of change in which it now appears to be".⁵⁰ In the third part, "contemporary society", he analyses "the social forms which are our personal experience", thoroughly examines the "crisis of our time", highlights the most important current changes in the political, economic, educational and international fields, and explores the probable trends in their orientation.

Here the sociology proposed by Medina and the meaning and function of its different parts are outlined clearly. The analytical approach, with its vigour and architectural elegance, is the appropriate instrument to analyse the general social phenomena and constitutes the point of entry to concrete sociology which transforms the concepts of the former in order to bring them closer to reality and permit historical understanding of the origins, present status and trends of current societies, which make up the "social situation" of modern man.

III

The foundations of the sociology of development

Medina's writings can be divided into two stages, the dividing point between them being his joining CEPAL at the beginning of the 1950s. In the first stage, set out in the previous chapters, he outlines the perspective of sociology and established it as a rigorous science; in the second he lays down the foundations of

the sociology of development and analyses some of its fundamental themes.

It is necessary to ask whether Medina is brought to the sociology of development as a consequence of the spontaneous evolution of his thinking—and regards CEPAL as a favourable environment to develop it in—or whether, in contrast, his joining CEPAL, prompted by

teos. Papeles de Sociología (Mexico City, Instituto de Investigaciones Sociales de la Universidad Nacional, 1953), p. 224.

⁵⁰*Ibid.*, p. 225.

other reasons, is a fact which influences and guides his intellectual activity towards the sociological problems of development. It is very likely that Medina thought CEPAL could offer him a safe haven, a legal and economic umbrella which would free him and his family from the sometimes very abrupt changes in Latin American history. The insecurity of his status as an exile and the prospect of a wandering life must have been fundamental reasons for his decision to join a United Nations organization. Of course the CEPAL of that time was not just any common or garden international organization, but one in which original economic thinking was being created through intensive debate: for Medina this feature must have been an additional, although not decisive, attraction.⁵¹

CEPAL's interest in economic development and Medina's vocation for sociology helped him to create the hybrid field of the sociology of development. However, this was not a new preoccupation, since in some pre-CEPAL essays —particularly "Economía y sociología", written in 1941— his interest in the subject is already clear. Moreover, there are others which also attract him, and probably, if his intellectual haven had been other than CEPAL, they might have warranted his later attention: thus, the epistemology of the social sciences and the sociology of culture and of art, among others, emerged strongly in his early writings, and he was to refer to them subsequently with a certain nostalgia.

At all events, above and beyond the reasons which prompted him to join CEPAL and the slant CEPAL introduced in his thinking, the two stages of his thinking are highly compatible, since the first is characterized by the subjects involved in the foundation of sociology in general, and the second by the

construction of the special edifice of the sociology of development on those foundations. This compatibility means that we can be certain that even if Medina had not followed when he did the intellectual path of his first stage, he would have found himself obliged to do so later, when in CEPAL he was faced with the imperative of creating a sociological perspective on development.

The beginning of economic sociology

1. When Medina, in CEPAL, comes up against the need to grasp economic development conceptually, he does so —and he could not have done so otherwise— using the categories of thought which he had been outlining during the previous 20 years. Economic development is undoubtedly a 'social fact', but what are its particular characteristics?

Firstly, does it belong only to the sphere of economics, or has it a broader range which extends to other areas of social reality? Economic development is largely an economic phenomenon —he was even to claim, in the middle of the 1960s, that its 'essential mechanism' is economic— but its significance goes beyond those limits. Economic development is a "phenomenon of social change" in which what changes is "a social structure in its totality, along an identifiable line between two precise moments",⁵² i.e., it is a 'total', 'integrated' phenomenon. This 'total' nature of development, which Medina underlines from his first writings in CEPAL, appears to derive from two assumptions, one historical and the other theoretical. On the one hand, economic development is a piece of the "general process of rationalization", a consequence of the "civilizing process" in which technical power and scientific knowledge converge, as he often said, using the concepts coined by A. Weber. Because of the force of this general process of rationalization, "a universal tendency in our times", history is moving in a specific direction: towards the formation of industrial socie-

⁵¹The cold war and Macarthyism may perhaps have increased the uncertainty of his personal circumstances, but the fact is that Medina, despite his brilliant background as a social scientist, joined CEPAL in August 1952 as an editor —in other words, to improve the style of what the economists wrote— and remained in that position for some years before being accepted as a sociologist. This fact may at least serve as some consolation to all the sociologists who survive thanks to the self-sacrificing work done to improve the language of others.

⁵²"Las condiciones sociales del desarrollo económico" (1955), in *Aspectos sociales del desarrollo económico*, op. cit., p. 51.

ty.⁵³ Because of its total character, this process encompasses and imbues the whole society, including the economic process. On the other hand, there is a theoretical assumption that also lays the basis for this total nature of development: society is a 'system'. "Society is never a mere agglomeration of actions and processes, but tends to be or to become a system, although it perhaps never succeeds in achieving this completely." As a result, "from whatever aspect one begins to examine human life —provided that one does not dally arbitrarily—one is certain of returning once again to the same place after having described a full circle".⁵⁴ In short, not only do the historical roots of economic development make it necessary to regard it as a total phenomenon, but also, like any other social phenomenon, when penetrating into a society which is in itself a 'system', it requires 'conditions' and produces 'consequences' which go beyond the economic sphere. The formation of industrial society involves processes of very varied kinds, and as a result "only in analytical abstraction is it possible to speak of economic development as an independent phenomenon; in reality this process unfolds interlinked with another of a social nature".⁵⁵

Secondly, Medina emphasizes that, although development is a real trend in the historical process, it is also an objective expressly pursued by the social actors. It is at the same time a real tendency which influences and defines the concrete situation of the social actors and an aspiration which shapes the objectives they set themselves; it is reality and aspiration, historical tendency and normative model. For this reason, there are both one and many paths of development, since various possible courses exist, in the selection of which there is a margin of choice, of freedom. Economic development has its inescapable imper-

atives, but these may be compiled with in very varied ways and at very varied speeds, and choice between them requires a substantial amount of human decision; as in individual action, development combines necessity and freedom. In Medina's view, economic development, *qua* social change, always passes via man's consciousness, since any social change is historically and ethically attributable to human decision and responsibility. In making this formulation, he also returns time and again to A. Weber's historical view that peoples with their orientations, which constitute the 'culture process', respond to the challenge of their 'vital aggregates' made up of the combination of the 'civilizing' and 'social' processes. These vital aggregates constitute the reality which is available to be moulded as far as possible to human aspirations and, in their response to it, men and peoples always necessarily manifest "a possibility of preference and choice, of creation and freedom".⁵⁶

These two features enable him to define, in general, the role that falls to the sociologist. If development is a total phenomenon, its student must take into consideration social realities as a whole and highlight the interdisciplinary nature of development, as an object of analysis. This Medina does from the outset of his interest in the subject, but what is the role that falls to the different social sciences? He finds the answer to this question in his PRECIPAL studies on the manner of tackling social reality: to respect the approaches of the individual disciplines and make use of their results, especially those of economics, but always to remember their limitations, and accordingly the need to complement them with the sociological point of view, both analytical and concrete.

Moreover, if development is both a real tendency and a social objective, the sociologist must leave aside the technical attitude prompted in him by the scientific principle of 'neutrality in values' and adopt a critical posture. Since "this element of freedom is inescapable, the sociologist cannot avoid participating at the time of outlining preferences and decisions.

⁵³"El papel del sociólogo en las tareas del desarrollo económico" (1958), in *Aspectos sociales del desarrollo económico*, *op. cit.*, p. 15.

⁵⁴"Tres aspectos sociológicos del desarrollo económico" (1955), in *Aspectos sociales del desarrollo económico*, *op. cit.*, p. 70.

⁵⁵"El papel del sociólogo en las tareas del desarrollo económico", in *Aspectos sociales del desarrollo económico*, *op. cit.*, p. 21.

⁵⁶*Ibid.*, p. 27.

On the contrary, he is obliged to co-operate critically in making them with maximum possible clarity and responsibility.⁵⁷

Medina maintains this initial conception of development and the role which falls to sociology and sociologists within it in many later writings. For example, he returns to the theme of the sociological approaches to development in 1963 and divides them into two types: those stimulated by praxis and those required by knowledge.

A good example of the first type is social policy, whether it is conceived as 'social assistance', which endeavours to improve living conditions, or as, 'human investment' which aims at developing and improving those social aspects which, like education, can have a decisive effect on economic growth. Medina respects these perspectives, but not only gives them little support with his personal work, but believes that they may lead to erroneous approaches. In particular, they may lead to the social aspects being regarded as epiphenomena or residual of the economic aspects, and to social objectives being subordinated to economic objectives forgetting that the former are independent, respond to "what are regarded as permanent, paramount values" and "are related, not so much to development itself—a neutral and intermediary mechanism—as to the kind of society to which development aspires or which it is intended to produce".⁵⁸

The viewpoints demanded by knowledge do not refer to social problems or human investment but endeavour to interpret the economic process in relation to the overall social structure of which it is part, and they take the form of two variants, analytical and historical, in line with what has already been said concerning Medina's sociological view.

2. His first outline of economic sociology, carried out at the beginning of the 1940s, is devoted to a study of the relationship between economics and analytical sociology.⁵⁹ In it, he

reviews the different ways in which the relationship between the two disciplines at the analytical level has been conceived and outlines a general position on the problem which, with some variations, he will maintain later in his CEPAL writings. One may infer from his structural conception of society that it is necessary to achieve the broadest possible analytical perspective, and accordingly that interdisciplinary efforts must be stimulated. For this reason, he begins by rejecting the typical posture of neoclassical thinking in economics, which keeps its distance from sociology, citing the defects which that discipline is alleged to suffer from, such as the vagueness of its propositions, the preference for imprecise or disproportionate objects of analysis, internal disagreement concerning theoretical perspectives and interpretation of results, and inappropriate use of the scientific method. Medina feels that this is a mistaken position, and the neoclassical criticism, which might apply with some reason to the encyclopaedic sociology of the last century, does not do justice to present-day sociology; those who now persist in such criticism "are not so much manifesting their scientific antipathies as defending their own brand of sociology, in other words, the sociology which is implicit in, and a necessary assumption of, a particular economic system".⁶⁰

As is well-known, other schools of economic thought have emerged to overcome this short-sightedness in the neoclassical approach, such as the German historical school, which emphasizes the transitory and historical nature of the alleged universal 'laws' of economics—which would always have to belong to a concrete society—and North American institutionalism, which opposes the excessively abstract nature of neoclassical thinking and underlines the need for a realistic interpretation of economic life.

Medina believes that the schools of thoughts are correct up to a point, but emphasizes that they in turn commit a basic error since they dissolve economic theory in philosophy, history or sociology to the point of causing it to disappear, but at the same time are

⁵⁷*Ibid.*, p. 28.

⁵⁸"Economic development in Latin America—sociological considerations", CEPAL document E/CN.12/646, mimeographed, p. 5.

⁵⁹"Economía y Sociología" (1941), in *Responsabilidad de la Inteligencia*, op. cit., 1943.

⁶⁰*Ibid.*, p. 100.

incapable of themselves formulating a new and rigorous integrated theory to take the place of the conventional theory. For this reason he suggests that more fruitful paths should be sought in the area of the relationship between economics and sociology—paths which would broaden, improve and not dissolve the theory of the first with the perspective and findings of the second.

The quest for this path is based on two profound convictions of Medina's which must be emphasized. The first is that social science must be first and foremost a science, and that this imperative imposes inescapable requirements. Although it may arise from concrete, and therefore particular problems, the scientific task makes it necessary to rise from them to more general and abstract concepts and relationships, towards those basic 'schematisms' which articulate any social reality. "Under the diversity of the concrete or historical structures of the different societies there are certain schematisms in the most elementary attitudes and relationships which ... constitute the fundamental assumption or foundation of all their manifestations [and] indicate the ultimate and decisive elements in a social structure, on whose existence or non-existence depends the possibility of specific concrete realizations."⁶¹

To this first epistemological conviction Medina adds his belief that among the social sciences only economics has been able to achieve fruitful results at the analytical level, because its theoretical construction asserts itself over a small number of fundamental schematisms. It is true that these schematisms can in turn rest on unreal assumptions or give rise to theoretical constructions which are excessively closed in on themselves, but in Medina's view these are not sufficient grounds for rejecting them. Rather, their success should guide interdisciplinary analytical efforts. "In the study of economic development as an overall phenomenon, the decisive and central role which falls to the economist in this 'interdisciplinary' co-operation is readily recognized by all as something obvious. It is the economist

who must lay down in principle the guidelines for the research, indicating the problematical questions he considers most important and suggesting the tasks which he deems complementary to his own work."⁶²

The greater analytical achievements of economics compared with sociology lie, as has already been said, in the better adaptation of its object of analysis to scientific treatment, but the greater scientific status of economics, whatever the reason for it, justifies both its pre-eminence and the subordination it imposes on sociology in this interdisciplinary relationship. Scientific reason, and not the possible meaning of its objects, is for Medina the basis for leadership in the common task. If sociology enters into the analytical stronghold of economics the most likely result will be negative, since all that it will achieve will be to pull economics down to its own scientific level; it would therefore be best for sociology to fulfil its task from the outside, reviewing and improving the foundations—the assumptions—on which economics rests.

However, as early as in "Economía y sociología", when evaluating some works by Parsons, he warns against the type of analysis which maintains a high level of abstraction and does not seek concrete historical assumptions.

Parsons endeavours to complement conventional economic theory with analytical sociology, for which purpose he proceeds from the basis that, *qua* theories, both are inevitably analytical abstractions and not descriptions of concrete facts. Economic theory is oriented towards the analysis of economic action—which Parsons defines, in the style of Robbins, as rational action, or that which seeks to achieve optimum solutions with given ends and scarce but alternative means—while politics is directed towards the analysis of political action and sociology towards the analysis of social action in general. If economic theory, the theory of rational action, does not stand up to empirical proof it must be complemented with other theories of non-rational action, especially political, and with the general theory of action supplied by sociology. In this way they all

⁶¹"Las condiciones sociales del desarrollo económico", in *Aspectos sociales del desarrollo económico*, *op. cit.*, p. 51.

⁶²*Ibid.*, p. 48.

remain autonomous and complement one another.

Medina endorses Parsons' attempt to avoid the merging of sociology and economic theory, but believes that it will not be successful if it remains at the level of high analytical abstraction. "The social sciences are not purely and exclusively analytical constructions, but above all concrete sciences".⁶³ The principles of economic analysis and analytical sociology will be useful only when they make it possible to gain knowledge of concrete reality and to find one's way in it; between these principles and reality there is a gap which can only be overcome by means of the '*principia media*' which express the concrete operation of the general principles of the 'structural conditions' in which they operate. The sociological assumptions of economic theory—as conceived by A. Lowe, changing with the changes in reality—are those '*principia media*' demanded by Medina.

As is obvious, in his analysis of the relationship between economics and analytical sociology Medina re-emphasizes the need for a theory which provides the fundamental concepts and principles, but stresses—as he had already done in his criticism of Simmel—that if it remains at this level the theory runs the risk of "sliding over reality". Hence the need for the '*principia media*' which make these general concepts and principles specific in given historical societies. It is this concrete analysis, the ultimate *raison d'être* of sociology and the basis of its nature as 'knowledge providing guidance', which serves as a complement for economic theory by revising the inevitable sociological assumptions on which it is founded. This was, of course, the suggestion by A. Lowe which had so much influence on Medina. According to Lowe, sociology should explore the concrete social assumptions of economic theory which, although usually implicit, are basic components of it. Conventional economic theory was realistic while its sociological assumptions corresponded to reality, and will be so again when they are again consistent with the social conditions which actually exist; and

⁶³"Economía y sociología" in *Responsabilidad de la inteligencia...*, *op. cit.*, p. 118.

in this task of bringing economic theory closer to reality sociology can provide considerable assistance.

Still dealing with the analytical approach, Medina analyses the ambitious attempts which have been made to incorporate sociological variables in existing economic theory.⁶⁴ In other words, maintaining the nature of economic theory as a 'model'—a 'quantified theory' or 'quantified set of hypotheses' which is expressed in causal or correlation relations—they endeavour to insert social variables in it. Medina holds that for the time being these attempts are doomed to fail because of the nature of the facts specific to sociology: its complexity, multiplicity and difficulties in quantification and measurement do not permit the precise establishment of relationships between the sociological variables, and between them and economic variables. The relationships between the latter are 'functions' which make rigorous prediction and practical application possible, but their different nature prevents them from forming a common theory with sociological variables, unless economic theory is to lose in scientific rigour and practical applicability.

However, these difficulties in rigorously establishing the interdependence between economic and sociological aspects have not discouraged sociologists, most of whom base their theories on some assumption about the interdependence which would seem to exist between the various types of human activity; we have already seen that Medina too makes an assumption of this kind, starting in his early works, in line with the Comtean theory of consensus. He knows that it is not possible to establish rigorous relations between economic and sociological variables, but he asserts that there is an important connexion between them. He refers to this connexion in different ways: sometimes he speaks of 'eufunctional' rela-

⁶⁴He sets out these ideas in "El papel del sociólogo en las tareas del desarrollo económico" (1958), in *Aspectos sociales del desarrollo económico*, *op. cit.*, pp. 18-19, and in "Relationship between social and economic institutions: A theoretical model applicable to Latin America", *Economic Bulletin for Latin America*, Vol. VI, N.º 1 (March 1961), pp. 27-39.

tions, using the strictest structural-functionalist terminology; at other times he uses the Weberian concept of "consistency"; and, finally, prompted by aesthetic zeal, he uses, like Goethe, the idea of "elective affinities".

This type of relationship can prove inadequate but "within its limits ... it enables diagnosis to steer a fairly accurate course, in complex historical situations, between the two extremes of exaggerated faith in the value of absolute prediction—scientific and quantifiable—and the discouragement provoked by mere groping in the dark".⁶⁵

The social conditions of economic development

1. It is clear from the preceding pages that for Medina the attempts to link economics and sociology at the analytical level have led to various theoretical impasses. Those who have sought to unite them in a complicated way by creating an integrated scheme of interpretation have come up against the problem of the differences between economic and social phenomena and, at the same time, the different theoretical treatments which they permit; the merging of analytical economics in history or in sociology and the frustrated incorporation of sociological variables in economic models are examples of the poor results achieved by following these incorrect paths.

Sociology should work 'from outside' the theoretical schemes of analytical economics and not seek to penetrate into them. Despite this limitation, its task of supplementation can be most valuable: i.e., to assist in critically refining the economic 'model' by indicating its partial and abstract nature and avoiding the fallacy of inappropriate concretion; to prevent the economic 'bottlenecks' caused by insufficient or poorly adjusted social factors and the social consequences of the application of the economic models; and, above all, to uncover the social assumptions or conditions on which these models are based. It is this last type of interdisciplinary co-operation between economics and sociology which Medina pro-

⁶⁵"Relationship between social and economic institutions...", *op. cit.*, p. 32.

pounds with greatest emphasis, but he also warns against merely analytical treatment of these social assumptions: once it has reached this point, analytical sociology should promptly yield to concrete sociology, for only the latter will be capable of linking the economic models with the historical reality which gave rise to them and makes them meaningful.

It should be no surprise, therefore, that Medina's first essay in CEPAL is entitled 'The social conditions of economic development'. In it he sets out a preliminary programme for the study of this topic containing all the aspects which, in his view, sociology can tackle in relation to development.⁶⁶ If no account is taken of the order in which the subjects are presented (which must have been a result of circumstantial factors), and if they are analysed in detail, it will be observed that behind them appears an interpretative scheme which derives from his basic sociological categories.

In principle, development is a historical tendency which causes transformations throughout society and, as such, must be analysed from the analytical and concrete points of view. The former deals with the fundamental schematisms which underlie the whole social structure—and which Medina believes can be grasped using Parsons' "pattern variables"—while the latter incorporates the contribution of history; with the contributions of both viewpoints 'analytical typologies' could be constructed which would make it possible to outline the orientation of that historical tendency and the situation of the Latin American countries in relation to it.

However, as has already been said, development is also a social objective, and accord-

⁶⁶Medina gives these social aspects various names. The definition most in accordance with his ideas appears to be that which reserves the terms 'social aspects' and 'social factors' for the most general characterization; 'social assumptions' for the external, but indispensable, sociological aspects of an economic theory; 'social conditions' for the aspects which refer to a historical interpretation of a real process; and, finally, 'social obstacles' for the social aspects which hamper the achievement of certain planned economic objectives or, in Medina's explicit terms, the "social bottlenecks which prevent ... the normal and unhindered flow of the desired economic process". See "Tres aspectos sociológicos del desarrollo económico", in *Aspectos sociales del desarrollo económico*, *op. cit.*, p. 71.

ingly it is necessary to ascertain 'what is wanted', with all the ideological connotations of the subject, the manner and the means to be used and the social groups which will attempt it.

The studies linked to development as a tendency and as an objective, or to put it another way, the analytical, historical and normative approaches implied in them, introduce some of the problems which were of greatest interest to Medina, especially, as will be seen below, in relation to the 'Weberian paradigm'. Using them as a basis, he defines the 'model' of development which will serve as a 'normative orientation' of action by the social actors.

Once the 'model' of development has been defined as a real tendency and a social objective, it is necessary to analyse the social actors who, in a wide variety of spheres of action, must behave in a manner appropriate to it. On the one hand, it is necessary to study the actors themselves—their characteristics, behaviour, motivations and so on—whether they are public or private managers, workers, politicians, bureaucrats, technicians, intellectuals and so on. On the other, it is necessary to analyse the spheres of activity in which these actors operate, such as enterprises, the State, scientific, technical and educational institutions, trade unions, political parties and movements, and so on, in addition to the relationships between them.

Finally, the actors and the spheres of activity exist and operate amidst material, cultural and social conditions which Medina also includes in his list; among the latter he highlights some 'concrete social structures' such as social stratification, the family, agrarian and urban structures, and population.

2. When Medina endeavours to define the model of development, both from an analytical and from a historical and normative point of view, and its social conditions, he enters into a dialogue with M. Weber since, in his opinion, the most profound analyses in this field were formulated by Weber when he inquired into the social assumptions of liberal economics or the social conditions of formal economic rationality.

In seeking guidance in this complex sub-

ject, he says, one calls either on the historian or on the theoretician. In other words, the questions are asked in the concrete terms of the historian or the abstract terms of the theoretician, both equally relevant and important. For the former, the fundamental question refers to the historical role played by concrete social conditions in economic development, while the second focuses on the link between sociological assumptions and economic theory.

According to Medina, Weber supplies the best formulation both of the ideal historical type of the origin and formation of the Western developed economies and of the theoretical model or paradigm of the 'liberal capitalist' structure of a society. In his historical interpretation Weber holds, in general terms, that as economic development is a manifestation of the overall process of rationalization of Western culture, its cultural or spiritual nucleus has been 'economic rationality' and, accordingly, attention should focus on the conditions which have made possible the emergence, development, functioning and maintenance of that rationality. In this rational orientation of economic action and in the conditions which made its continued predominance possible lies the historical root of liberal capitalism. These conditions, in turn, are the social assumptions of the theoretical model of the liberal structure, notably the free market, full competition, the complete appropriation by the enterprise of the physical means of production, freedom of contract in labour relations and the 'laissez faire' State.

A fundamental proposition clearly emerges from the Weberian thesis: economic development is based on the deployment of formal economic rationality, which is what is achieved in the economic relations established within the liberal social structure. This economic development is 'liberal capitalist' economic development, and the conditions for the establishment of a liberal social structure are requirements for the achievement of economic development and social assumptions of the economic theory.

Medina rightly terms Weber's proposition 'the Weberian paradigm', because not only is it a historical interpretation of the emergence of capitalism and an analytical theory of the

basic elements which constitute the liberal social structure, but it also provides, in the hands of his epigones, the framework for the 'model' of society which should be constructed if it is wished to stimulate economic development. In other words, it is at the same time a historical interpretation, an analytical theory and the foundation of a policy for the modernization of society.

In his early writings in CEPAL Medina temporarily accepts this proposition, perhaps because he was obliged to create in a short time—pressured by the 'resentful impatience' of the economists—an economic sociology which would not only explain what economic theory could not explain, but would also make it possible to guide practical action.⁶⁷ Its application enables him to feel on safe ground because, in addition, this proposition served as a basis for the sociology of development which was being formulated in the major English-speaking academic centres; the work of T. Parsons and W. Moore was widely known, and the latter even wrote at the request of UNESCO an essay on the social frame of reference of economic development which Medina often used in those writings.

An example of Medina's acceptance of the Weberian thesis can be seen in his analysis of the social conditions of economic development in Bolivia. Using a list of social 'requirements', drawn up on the basis of the Weberian formulations of W. Moore, he carries out an interpretation of the 'obstacles' to economic development presented by the social structure in Bolivia. Property, working relationships, the market, the political order, the organization of production, public administration, scientific and technical education, are among the aspects on the basis of which he organizes his description and explanation of the social situation and the measures which can be worked out to modify them if they are to serve as a foundation

for economic development. All these social aspects should endeavour to reproduce the liberal model; for example, concerning the market he asserts that "the type of human relations and behaviour which make the functioning of a market possible constitute an inescapable social assumption for any economic development".⁶⁸

3. However, from the outset Medina is aware of the limitations of the Weberian paradigm, if it is taken as a normative model. Thus, in his first work in CEPAL he emphasizes that the technical, economic and social problems of development in Latin America "cannot be resolved by copying the past or by imitating the supposed real models offered by the more advanced countries".⁶⁹ These models are usually only myths or academic crystallizations which do not exist in reality, and, as a result it is necessary to stimulate 'creative ingenuity' in the task of 'extending industrial civilization'; but as it must be an ingenuity linked to reality, much care is necessary when invoking history in search for the model of development.

Subsequently, in his essay 'El papel del sociólogo en las tareas del desarrollo económico', written in 1958, Medina redirects his thinking on the basis of a critical evaluation of Weber's thesis, in which he concludes that the thesis has been invalidated by history. This invalidation is the result of two processes, which Medina analyses in various of his works. On the one hand, the transformations which have occurred in the 'liberal capitalist' social structures of the developed countries have carried them away from the archetypal features proposed by the paradigm. Among other aspects, there has been a marked reduction in freedom and competition in the different markets and a substantial change in the relations between the State and the economy, and, as a result, the real societies which the underdeveloped countries have before them are very different from the theoretical models which they

⁶⁷Years after his first writings in CEPAL he was to express regret for various of his initial lapses. The very term 'social aspects of economic development' was to seem of 'extreme ambiguity' to him, and he only justified it "as the literary recourse of a specialist wishing to collaborate harmoniously with other scientists and entering at his own risk on admittedly foreign territory" (CEPAL document E/CN.12/646, mimeo, p. 1).

⁶⁸"El problema social en el desarrollo económico de Bolivia" (1956), in *Aspectos sociales del desarrollo económico*, op. cit., p. 115.

⁶⁹"Las condiciones sociales del desarrollo económico" in *Aspectos sociales del desarrollo económico*, op. cit., p. 36.

are urged to imitate. On the other, socialist societies have appeared, which, despite all the forecasts to the contrary, have found their own path towards the achievement of economic development based on economic processes and social assumptions which are different from those suggested by the 'liberal capitalist' model.

Both processes have drastically reduced the scope of valid application of the Weberian paradigm, since from a historical, theoretical and practical model of all possible economic development, it has become limited to a theory relating to the origin and foundation of the original liberal capitalist structure; the explanation refers to only one of the possible types of economic development, and not to all.⁷⁰

For this reason, the suggestion that in order to achieve development it is necessary to align the social structure with the dictates of this paradigm is "innocent enough if it were not so dangerous",⁷¹ and, Medina insists, the essential task of the sociology of development consists in constructing the desirable and possible 'new models' of social structure consistent with economic development.

This reorientation of Medina's thinking, which starts from a critique of the Weberian paradigm, can be understood as a reassessment of the role played by material reason in relation to formal reason in economic development. Mention has already been made of the differences between these types of rationality when outlining Medina's propositions concerning the scientific and instrumental nature of the social sciences; the same problem now reappears in relation to economic development. Weber suggests in this regard that the only possible development is based on the stimulation of formal rational economic action which germinates and grows in the favourable conditions of the economic and political institutionality of the liberal social structure, but Medina

is convinced that history has shown other paths, through the 'reform' of capitalism and socialism, which are based on a combination of the two types of rationality different from that suggested by classical liberalism. Economic development thus conceived is not the indirect result of the achievement of the particular benefit by the rational economic agents, but —only or also— the planned result of a politico-economic rational action directly aimed at achieving it.

In short, the 'historical invalidation' of the Weberian paradigm leads him away from uncritical acceptance of the 'liberal capitalist' model of economic development and its social assumptions and enables him to glimpse new subjects within the sociology of development. In particular, he is guided towards the analysis of the 'essential mechanism' of economic development and of the 'real models' in which it is manifested, since these constitute the necessary base for devising development strategies, with their specific social conditions, for the countries of Latin America.

4. Even so, his critique of the Weberian paradigm does not imply a rejection of the more general matrix of this school of thought. Economic development continues to be conceived by Medina as a specific manifestation of the overall process of rationalization and, as such, bases its vigour on certain orientations of the economic actions of the important actors which emerge, develop and predominate if they enjoy favourable conditions and the appropriate economic and political institutional framework.

Within this analytical scheme, Medina formulates a proposition which is very important for his sociology of development: economic development has an 'essential mechanism' which can be operated in various ways —all of them variations which occur within the theoretical and historical space separating the extreme types of capitalism and socialism— and the most important 'social conditions of development' are those required by this essential mechanism, plus those linked to the concrete forms adopted by the process.

Medina details the nature of the essential mechanism of any economic development in

⁷⁰The 'Weberian paradigm' is a "social model of economic development which only corresponds to a very precise historical stage in that development". "El papel del sociólogo en las tareas del desarrollo económico", in *Aspectos sociales del desarrollo económico*, *op. cit.*, p. 22.

⁷¹"Relationship between social and economic institutions...", *op. cit.*, p. 30.

his essay "El desarrollo y su filosofía",⁷² following the lines of another Weberian, E. Heimann. Basically, he asserts that "economic development is a continuing process whose essential mechanism consists in the repeated application of the surplus for new investment, and which has as a result the equally constant expansion of the unit of production concerned ... [which] may of course be an entire, large society ..."⁷³

In the societies which existed before the modern era economic activities were regulated and guided by the aims of other institutions (political, religious, family, and so on), to which they were subordinated both as regards their aims and the manner of achieving them; they were "integrated economic systems" in Heimann's terminology. The specific characteristic of historical capitalism—and later of socialism—is the gradual loosening of the ties between economic activities and the other institutions and their slow channelling towards independence, first, and predominance, later. In its extreme ideal type this process culminates in the shaping of pure economic systems, which are those where the essential economic mechanism—generation and productive investment of the surplus in order to expand wealth to the maximum—predominates over and subordinates every other aim existing in the society. Accepting the characteristic exaggeration of any ideal type, what is important is to underline that all the developed industrial societies have had to pass through a stage where their operation is fairly similar to the pure economic systems, characterized by the predominance of the essential mechanism of economic development, although subsequent historical evolution and doctrinaire values have lessened the rigour of this predominance.

This inevitable "economism" of any form of development is manifested in various ways historically and theoretically, although its typical forms are those specific to the capitalist and socialist social structures; in the essay just referred to Medina reviews them under the titles of "market economism" and "planning

economism". In addition, in the final part of "Economic development in Latin America—sociological considerations", after emphasizing that there is no single formula for development, he analyses the different technico-economic, political and sociological options on the basis of which the concrete strategies can be articulated.

We will return to all this in the next chapter when sketching Medina's thinking concerning the relationship between development and politics. For the moment it is merely necessary to repeat that it is on the basis of the 'essential mechanism' of any form of development that the most general and strategic factors of any economic process thus directed are structured.

Even if analysis of the social aspects is limited to those linked to the essential mechanism of development, it is difficult to present a single list of them, since Medina uses various lists, with a different number of assumptions. For example, he reduces the dozen factors he uses in "El problema social en el desarrollo económico de Bolivia" (1956) to five in "Relationship between social and economic institutions" (1960) and to four in "El desarrollo y su filosofía" (1965). However, behind this variability there is a certain constancy in orientation which makes it possible to decide on the genuinely important factors.

The first and fundamental factor is a sort of motivational syndrome which Medina usually calls 'general economic commitment', in which he includes both 'economic aspirations', linked to the expansion of wealth and the improvement of living conditions, and a personal and collective sense of responsibility *vis-à-vis* the necessary and inevitable sacrifices implied by economic development. As is evident, this is an attitude consistent with the technico-economic mechanism of development, and Medina always refers to it emphasizing the aspects of responsibility, sacrifice and effort it brings with it. In the formation of this 'ascepticism' an important role may be played by the educational system, the mass media, the political and trade union organizations and the direct example of the behaviour of the leading groups; its importance cannot be underestimated, since "the most urgent of the development problems of the least ad-

⁷²In *Filosofía, educación y desarrollo*, *op. cit.*

⁷³*Ibid.*, p. 12.

vanced countries derive, or have in the past derived, from the need to create, shape or stimulate".⁷⁴ European experience indicates that the formation of this attitude in the working masses has been a task lasting centuries, but often, in our countries, even the leading groups have not adopted it. In that regard, and pointing to a central problem in peripheral capitalism, he points out that "the first formula [capitalism] can be attractive only if the ruling minority, which temporarily reaps the benefit of the efforts of the rest of the community, is the first to act with the proper sense of responsibility: to put the matter in economic terms, profit must be the visible instrument of rapid capital formation and not the unethical means of ostentatious expenditure".⁷⁵

The second assumption refers to the proper performance by the economic and political actors of the role which falls to them in development. If development is an organized process which requires the best energies of a people, the various economic and political functions fundamental for its success must be performed with skill, discipline and creativity. Skill refers in particular to the scientific and technical preparation required for the proper performance of the various functions, discipline to observance of the standards which indicate what are the duties to be performed, and creativity to the innovative nature which must be imparted to the performance of many functions. In "Las condiciones sociales del desarrollo económico" Medina reviews various social groups whose orientations and behaviour, in terms of the two assumptions referred to, are crucial for development: managers, workers, the State bureaucracy, the middle strata, the political élite and the intellectuals. But he gives priority to the first two, the practical skills of the workers and the executive skills of private and public managers.

The third assumption refers to the general economic and political institutional conditions which make possible and provide a basis for the predominance of the previous assumptions. The various models of development are dif-

ferentiated one from another, in particular, by the type of institutional framework they impose; however, they all have the same need for stability and continuity. Ownership may be public or private, the surplus may be appropriated by the State or by individuals but, in principle, all these institutional norms require a minimum of stability—as a necessary though not sufficient condition—to fulfil successfully their mission of imposing order. The same happens in the political field, since development is such a complex process that it needs to be organized in a 'programme' which grants regularity, continuity and the possibility of evolution to its essential mechanism and the motivational assumptions and skills which accompany it; the political order must play a fundamental role in maintaining this process of economic and political institutional organization. But together with stability in the economic and political institutional patterns Medina underlines that they must also be mutually 'consistent'. Indeed, he identifies consistency between the economic and political rationalities—or between economic development and democracy—as the crucial political problem of development.

At all events, and notwithstanding what has been said to the effect that these three 'strategic' aspects form a '*leitmotiv*' emphasized many times by Medina, he changes them when, at the beginning of the 1960s, he shifts his view to Latin America. Then, he does not bring into discussion the 'model' of development to be followed, but asks whether any type of development will be possible, whether its essential mechanism can be applied successfully.

In formulating this concrete question concerning the possibilities of development in Latin America he defines the strategic social conditions, giving much greater emphasis than in the previous trilogy to political aspects. Thus the new social conditions which are necessary for economic development demand that there should exist a social class or group which has control of the State, knows how to manage it with legitimacy and efficiency, and is guided by a set of ideas on development—an ideology—which is clear and precise. Stress on the civil society and its principal economic

⁷⁴"Relationship between social and economic institutions..." *op. cit.*, p. 33.

⁷⁵*Ibid.*

elements, managers and workers, has given way to the political power structure and its privileged classes, the 'political' class and the 'ruling' class.

However, these changes do not signify definitive theoretical changes of direction, but express differing analytical interests appropri-

ate for different objects of analysis, since at the same time as he looks towards the political problems of development, he insists that his colleagues should study industrial managers, urban workers and trade unions. Development continues, in his view, to be an overall phenomenon.

IV

The challenge of modernization

At the beginning of the 1960s, Medina finally decides to write on Latin America. He leaves behind the years when with methodical zeal he constructed his conceptual framework, and dedicates himself to outlining his interpretation of social change in this region.

From a methodological viewpoint, this task brings out his idea of history, since he is aware that "any sociologist interested in the phenomena of change relies, though he may not say so, on a theory of historical development, a conception of history in its total process".⁷⁶ The basic principles of his conception of history are very clear: the history of Latin America is a fragment of Western history, since the gigantic 'process of transculturation' which began with the Conquista was so profound that it converted the former into an often active and creative part of the latter, and the essential feature which gives meaning to Western history is the process of rationalization, of which economic development and social and political modernization form part, with specific manifestations. This process of rationalization embodies the essence of a tendency which dislocates 'traditional society' and tends to form the 'new society', modern and industrial.

However, Medina never believed that the process of rationalization was an unstoppable forward thrust in the history of Latin America, since he never shared in the naive evolutionism of many of those who, like him, conceive social change as a transition from the traditional to the modern. The history of a people may

show evolutionary trends which appear to channel it gradually towards an objective, but the reason for this happening lies in the determination of the people, in the motivated efforts of its members, and not in the supposed autonomous vigour of metahuman forces.

This important aspect of his conception is clarified in the light of what he called "the fundamental structure of the historical process".⁷⁷ He holds that this process can be conceived similarly to individual action; like the latter, it is a complex combination of necessity and freedom, of conditioning and spontaneity. Any people possesses material, technical, social and cultural conditions which, at the same time as they contain a range of possible alternative actions, fix the limits of what is objectively achievable. The alternative finally chosen from among those objectively possible will depend on the 'assessment' made of them by that people and on the decisions which are taken on the basis of the assessment. For that reason he asserts that "nothing inevitably determines the progress of mankind", which will always be the result "of a spontaneous and free act within the framework of the inevitable".⁷⁸ The fundamental structure of the historical process teaches us that it is not possible to resolve the 'enigma of the future', despite the efforts made in that direction by predictive sociology, among other sciences (which he reviewed in 1971).⁷⁹

⁷⁶ *Leciones de sociología, op. cit.*, p. 195.

⁷⁷ *Ibid.*, p. 191 *et seq.*

⁷⁸ *Ibid.*, p. 193.

⁷⁹ In one of the chapters of his article "Desengaños del

The past of a people and its present circumstances may indicate which are the basic tendencies in its orientation and which are the possible, and perhaps most probable, paths for its future. But they cannot make this prediction with certainty, since among the basic circumstances and tendencies of a society and its future is human mediation: the interpretation and evaluation of them by the members of that society and the resulting decisions provide history with its connotation of freedom and indetermination. Man has often felt sure he could solve the enigma of the future—religious prophecy and scientific forecasting provide evidence of these hopes—but Medina prefers the more modest recourse of the 'diagnosis', which through knowledge of the structure and trends of a situation facilitates the choice of some action alternative.

Bearing in mind this "fundamental structure of the historical process", there is no doubt that while for Medina the process of rationalization in Latin America is a real historical tendency, observable in many different spheres of human activity, it is in no way an end which will inevitably be fulfilled. Rather, it is an objectively possible alternative whose present degree of realization and future probability will vary substantially from one society to another.

If the future always includes a considerable margin of uncertainty, why should history be conceived as a definite transition from traditional to modern society? The reason for this procedure is in principle methodological, since, following Weber, Medina believes that the variety of historical phenomena can only be organized, described and explained using ideal, pure types. As is well known, these pure types are pure in that their elements, because of their extreme character, manifest complete consistency, an 'ideal' alignment of meaning. They are constructed on the basis of historical phenomena but are not a description of them; nor are they a theoretical model on the basis of which reality can be inferred, or a set of principles based on values which serve to guide action in that reality. They merely constitute a

tool for knowledge, a heuristic instrument which enables us to come to know reality by contrasting it with the ideal type.⁸⁰

M. Weber constructed many ideal types of social action and relation on the basis of the principle of rationality and believed that he had discovered the essence of real social phenomena by contrasting them with these types; he asserted that reality was not necessarily rational, but that he supposed it to be so for heuristic purposes. The distance between the pure type and the real phenomena enabled him both to highlight the specific features of the latter and, on the basis of them, to "put it in its place" in the almost infinite set of historical events, and, in addition, to suggest hypotheses concerning the role which some irrational elements might play in it. Medina might have made similar assertions concerning the methodological significance of his concept of "modern industrial society", but neither of these thinkers was able to avoid ambiguities and misunderstanding; the pure type tended—in the minds of others, and sometimes in their own—to cease to be a conceptual instrument and become a social objective. Increasing rationality, economic development and social and political modernization, which are regarded as tendencies in the historical process and, at the same time, from a methodical viewpoint, as ideal types, can only with difficulty avoid being transformed similarly into the 'future images' which must guide the social process. At all events, it is worth repeating that neither of them considered that these processes had a path traced in advance or that they were directed towards an inevitable aim. If it proves possible to construct the modern industrial society, it will be by dint of a hard and conscious human effort.

⁸⁰"In default of an outline interpretation, whether entirely valid or not, no light at all can be shed on the situation under consideration, and any attempt to influence it becomes meaningless. Again, the dimensions of the situation in question—and therefore of its interpretation—necessitate the simplifying devices for which the theoretical term is 'types' or 'models', and which in any case, far from portraying reality as a whole, merely trace the prevailing patterns that are indispensable for an understanding of those aspects of the existing state of affairs which deviate or diverge from them." "Social development of Latin America in the post war period" (CEPAL document E/CN.12/660, mimeo, p. 2).

desarrollo", in *Discurso sobre políticas y planeación*, op. cit., which is entitled precisely "El enigma del futuro".

The traditional structure and its decline

1. The sociological considerations which Medina formulates concerning the economic development of Latin America are explicitly and inevitably historical, since the analysis of the present situations and its predominant trends has its root in the past: "it cannot be maintained with regard to Latin America that what carries it on towards its future has no continuity with what has made it historically what it is".⁸¹ Schematizing his thinking, it may be affirmed that he constructs this historical interpretation on the basis of a characterization of the fundamental features of the traditional structure which has been forming since Independence, in order subsequently to delineate the nature of and etiology of its crisis and the emergence of the modern forms of social organization. In addition to the guide which this general outline provides for him, Medina's historical analysis has a precise delimitation which is given it by the social requirements of development. In concise terms: if the development of Latin America must be guided by a perfectly rational programme of action and must be based on a social class or group which, through control of the State, is capable of directing it, the principal question which must be asked of the present situation therefore refers to its ability to meet these requirements. In analysis, attention should be focussed on unravelling the present reality in order to learn its potentialities and errors in terms of these requirements and studying the past in order to find the origins of both. Medina's central question is: what is Latin America's present situation *vis-à-vis* the need imposed by these requirements? And his reply teaches us that the complex combinations of traditional and modern elements which are characteristic of our reality represent—even for the hopeful who succeed in overcoming pessimism—a formidable obstacle to development.

2. Any consolidated social structure relies on certain 'supports' or 'foundations' of a material or economico-social, spiritual or ideological

and political nature. The traditional structure of independent Latin America—the 'complex from which it springs'—had its own: the *hacienda*, liberalism and the traditional political system.

Among these he highlights the *hacienda* as the fundamental support. Any social structure has an institution which is its prototype, and that which corresponds to the traditional structure is the *hacienda*, a 'privileged' institution which articulates "from within the immense geographical body of Latin America". The *hacienda* formed Latin America materially, economically and socially. The *hacienda* is essentially a unit of economic production and a form of property. But it is also a centre of political and military power, which stands out even more clearly when the State apparatus of the colonial period disintegrates; the support of a family structure and the symbol of a family name; the basis for a 'social group' with its complex system of duties and functions organized by the authority of the seigneur; and finally the foundation of a seigneurial human type and way of life. However, it is not the only significant economico-social unit in the traditional structure, since together with it there exist the mining centres, and above all the cities, which are the seat of commerce and of the State and spiritual authorities. Beside the landowners stand the urban bourgeoisie, and the clash between them constitutes the most important political and ideological conflict up to the early decades of the present century.

If the material foundation for the traditional structure is the *hacienda* and the spiritual foundation appears and develops in the cities, the focus of the latter is liberalism, that "form of living and thinking". Encouraged by the opposition to absolutism, the metropolis forms the basis of the ideology of the independence movement and, accordingly, one of the "essential elements of the complex from which Latin America sprang". This complex takes shape "under the sign of freedom". It is true that in those years there were "military revolts, *coups d'état* and numbers of constitutional changes; but it is also true that there was never open denial of the ideals of the Independence movement and that, even under the most notable 'strong men' the letter of the constitu-

⁸¹CEPAL document E/CN.12/646, mimeo, p. 16.

tion still paid respectful tribute to the principles of liberalism".⁸²

However, the material and spiritual foundations of the original independence-gestating complex are initially contradictory, and in this inconsistency —“the first, and perhaps most striking paradox” of Latin American history— lies not only the cause of many political conflicts but also one of the reasons for the frailty of liberalism in this part of the world. Even so, liberalism penetrates and takes root in some of its doctrinaire manifestations —Manchester economic liberalism, constitutionalism, positivism and so on— to a sufficient extent to constitute the only ideology which has exerted a deep and prolonged influence.

From these material and spiritual foundations arises a political system which is consolidated when, in the second half of the last century, most of the countries of Latin America found some compromise formula to resolve the conflict between the countryside and the cities, between the agrarian oligarchy and the urban intelligentsia. The organization of the political institutions —electoral systems, State powers, public administration and so on— and the relations between them are designed on the basis of the European and North American liberal democratic models, the political parties organize as parties of the ‘caucus’ type⁸³ and the basic political mechanism involves a contrast and compromise between two parties —liberals and conservatives— whose relations are encouraged by areas of common interests and orientations and by the symbiosis which personal and family support permits.

Each of the foundations on which the traditional structure rests —material, spiritual and political— has its own dominant class which controls and guides human activity in those areas. In his analysis Medina gives special attention to two of these classes: the

‘political’ and the ‘ruling’ classes. The political class, which emerges from the compromise between liberals and conservatives, assumes responsibility for “putting the State together” and constructing the economic infrastructure, two essential pre-requisites for development in that period. The ruling class, the bearer of spiritual power, gives the traditional structure the solidity stemming from its continued adherence, despite its changes, to the nucleus of the liberal ideology. The two classes are closely linked to each other and to the materially dominant class —in fact, their members ‘circulate’ easily in the different areas and are clearly aware of belonging to the nucleus of power— and this link constitutes a framework which connects the various foundations and gives consistency to the traditional structure as a whole.

3. When its supports weaken, however, the traditional structure begins to decline. The *hacienda* begins to change into a mere profit-making concern, becomes ‘commercialized’ under the influence of the domestic and specially external economic dynamism, and the consequences of its transformation are as extensive and profound as the functions it formerly played in its role as a fundamental support of the traditional structure. Medina suggests in passing some of these consequences, such as the psycho-social problems —*anomie*, uprooting— caused by the disintegration of seignuerial paternalism and the expulsion of the labour force from the countryside to the cities.

Liberalism always suffered from an inherent fragility because it was in contradiction with the beliefs and ways of life of the majority, the rural population, and because of its utopian nature. The liberal utopia has two decisive ingredients: belief in the rationality of man and the conception of politics as dialogue and peaceful coexistence, and these began to suffer from the irrationalist attack which started in the second decade of this century and have lasted up to the present not only in Latin America, but throughout Western culture. Rationalist optimism has been succeeded by a profound mistrust in the power of reason, and the political standards of coexistence, dialogue and compromise are wavered down in favour

⁸²*Ibid.*, p. 39.

⁸³“Traditional local leaders, maintaining close ties with one another, supported each other on such occasions as election, through temporary organizations of party men who set in motion the well-known machinery of political gatherings, with oral or written statements of proposals and promises, but the members of these parties did no more than cast their vote or provide temporary support, with varying degrees of enthusiasm, for the actions of their leaders.” *Ibid.*, p. 92.

of "the urge of rash minorities shaping the destinies of their peoples to take *blind decisions*". The crisis of liberalism brings with it a profound "ideological disintegration" and great "spiritual confusion", from which we have still not been able to emerge. But Medina warns that these should not "convey the impression of chaos and upheavals" nor encourage impossible restorations, but should only promote the sometimes profoundly heterodox effort of "re-elaboration and reconstruction necessitated by liberalism, in both the political and economic spheres".⁸⁴

The decline of the *hacienda* and the crisis of liberalism deprive the traditional political system of its basis of support since, just as the new ideologies do not succeed in occupying the place left by liberalism, the new political elements do not succeed in forming a legitimate and efficient system. On the surface of the political process one may note that there is no political formula which replaces the old two-party system of liberals and conservatives and gives it stability; in the background one may perceive the cause of this shortcoming: there are no new political and ruling classes to take the place of those which guided the traditional society and, as a result, there are no strong political parties with clear courses of action which are capable of taking charge of the transformation.

In this point, perhaps, lies Medina's greatest preoccupation *vis-à-vis* the transition, since he poses time and again the same question as that posed by M. Weber with regard to Germany at the end of the Bismarck régime: which are the social classes and groups that are capable of leading and guiding the new society?

As already noted, his response could hardly be called optimistic. "The old oligarchy undoubtedly retains some of its capacity to command and its notion of national unity, but individual interests may weigh too heavily to allow it to act *effectively*. The new leftists, not only because of the urgency of their relentless daily problems, but because of their training and their idealistic dreams, usually have a

rather limited concept of what national *legitimacy* really means, and scant instinct for power and command."⁸⁵

The military also usually seek to recover lost legitimacy and efficiency but fail "because modern technology has become enormously complicated and requires compromise, planning and concerted action which, even with the best intention, cannot be called into being overnight".⁸⁶

Nor do the new masses, which originate first and foremost from rural-urban migration, represent a solution to the problem of the political vacuum. On the contrary, the fact that they have been uprooted and the 'mass situation' in which they live —characterized by congestion, insecurity, frustration and resentment— together with nostalgia for the lost traditional paternalism, may be the ideal breeding ground for demagoguery, extremism and the thriving of populist parties. The latter, erratic, dependent upon improvisation and inefficient, "spell grave danger" for Latin America. Thus, these new masses not only cannot provide the basis for a solution to the political problems, but in their present state represent a source of instability; in fact, they pose the enormous problem of their responsible integration into national political life.

But might not the solution lie in the hands of the middle classes? Medina does not answer this question lightly, but meditates upon it at length, both because of the influence which the bourgeoisie had in the development of the central countries and because of the importance attached to the question in the early 1960s in Latin America. In fact, he poses the problem of the middle classes as early as 1955 and, when analysing social stratification, highlights as a central question the small size of these strata in most Latin American countries —a weakness which is accentuated when one considers agriculture and the urban goods-producing sectors.⁸⁷ But in the same report he warns that the solution does not merely involve increasing the number of members of the

⁸⁵*Ibid.*, pp. 98-99.

⁸⁶*Ibid.*, p. 99.

⁸⁷"Tres aspectos sociológicos del desarrollo económico" (1955), in *Aspectos sociales...*, *op. cit.*, p. 92 *et seq.*

⁸⁴*Ibid.*, p. 65.

middle classes; it is necessary to consider in addition other aspects "of a qualitative nature, more difficult to analyse, but which are reflected in the difficulties involved in their rapid adaptation to the new economic conditions".⁸⁸

When he takes up the subject again in 1963, the years appear to have proved him right as regards the importance of the qualitative aspects; the paradox implied in the "Hoselitz hypothesis" —that the countries with larger middle classes, such as Argentina, Chile and Uruguay, are those which manifest the worst symptoms of stagnation in those years— he explains in terms of ill-directed 'dispositions' and 'attitudes' of those classes. In order to analyse the most important features of these classes he constructs the ideal type of the 'original bourgeois attitude' and contrasts it with the real attitudes of the present middle classes in Latin America. The distance he measures between them is enormous. The bourgeois culture which stimulated capitalist development in the centres was a complex combination of a "will for economic transformation", in which predominated the tendency to accumulation and investment, the spirit of innovation, risk and competition, the moral exaltation of labour, asceticism, and so on; a "will for independence *vis-à-vis* the State", which demanded that the State should fulfil its role in guaranteeing the rules, but rejected its economic intervention beyond the strict limits which were laid down for it; and a "will for social reform", which was expressed in the supreme values of freedom and equality. If the present bourgeoisie in the centres has already moved a considerable distance away from this ideal type, our middle classes have never even come close to it. On the contrary, although there have been slight indications of these attitudes in this part of the world, most of the members of the middle classes have endeavoured to adapt to the predominant economic and political patterns rather than trying to transform them radically. They are 'faceless' middle classes, which do not respond to Medina's appeal: "where do we find the self-control and discipline of the true creators of

modern capitalism the energy and austerity of the young *samurai* who built up modern Japan?"⁸⁹ In any case, even if it proved possible to create middle classes which were aggressive, ambitious and accumulation-minded—an 'acquisitive bourgeoisie'— there would not be enough of them to guarantee development, since what they can do depends in the final analysis on the "calibre and resolve of the 'political class' and on the guidance that can be provided by the '*pouvoir spirituel*' of the 'ruling class'".⁹⁰

4. When evaluating the results of economic and social development in Latin America, a feeling of ambivalence is inevitable: these results are simultaneously positive and unsatisfactory, some progress has been made but not enough, and accordingly achievements are intermingled with shortcomings and frustrations. Medina's sociological explanation is clear: this is so because it has not been possible to affirm resolutely the economico-social, ideological and political supports of the new society. Since the traditional supports are incompatible with the requirements of modernity, modernity can only be achieved if the foundations which are consistent with it predominate. But why has it not been possible to consolidate the foundations of modernity? Because, in fact, they coexist and combine with the traditional foundations, giving rise to a structurally heterogeneous society whose development is thereby hindered.

As is obvious, this combination of traditional and modern features can be explained both by the lack of vigour of the modern elements and by the survival capacity of the traditional elements. Is the absorption of the middle classes by the traditional structure a consequence of the weakness of the middle classes or of the strength of the traditional structure? In so far as this is a question of relative weakness or strength, it is not easy to resolve, and accordingly Medina does not finally opt for either. In "Economic development in Latin America—sociological considerations" he gives greater emphasis, to the weakness of the modern elements, while in

⁸⁸*Ibid.*, p. 95.

⁸⁹CEPAL document E/CN.12/646, mimeo, p. 84.

⁹⁰*Ibid.*, pp. 85-86.

the introduction to "Social development of Latin America in the post-war period" he presents his well known hypothesis on the 'flexibility' of the traditional structure which absorbs or assimilates modern elements without modifying its basic foundations. "The 'traditional' structure has been relatively permeable, and ... this permeability has enabled it to absorb such elements of 'modernity' as it has needed without damage to the structure itself."⁹¹

This heterogeneity has taken a wide variety of forms. Sometimes it involves the mere persistence of traditional forms, as in the case of some agrarian social relationships; in others, the traditional structure assimilates modern elements without being radically modified, as in the example already given of the middle classes; in many others hybrid forms emerge and predominate which are neither traditional or modern, since they correspond to the transition, as occurs in the clientage system and in populist movements and régimes; and, finally, the decline of the traditional forms may lead to 'gaps' which are partially and inadequately filled by diverse elements, as in the ideological confusion caused by the decline of the liberal ideology.

At all events, Medina believes that the coexistence of traditional and modern elements is the feature which defines the situation in Latin America at the beginning of the 1960s and that, in addition, the agreements are more important than the conflicts in this coexistence. "What is important is not so much the differences and tensions between two different ways of life, as the thread of their continuity — in other words, their interpretation, the reactions of the backward sectors and the efforts towards expansion of the most advanced."⁹² The latter is the reason for which he also rejects the so-called "structural dualism" which was so fashionable in those days.

Finally, mention should be made of the problem of external influences. The short outline in the preceding pages might give the

erroneous impression that Medina does not attach due importance to external influences in the development of Latin America. In fact, however, he emphasizes the "tremendous impact on the history of Latin America (and indeed, on the Hispanic world in general) of events taking place outside it, more than once with adverse effects" and it is not a question of the influence of isolated facts, since because this region is part of the Western world, the stages in its politico-social history "coincide with specific moments in European history (the only universal history at that time) until we reach the period of the world wars"⁹³ These general references are useful in order not to repeat some already cited examples of external influences, such as those which were manifested in the 'comercialization' of the traditional *hacienda* and in the break-up of liberalism.

5. The outline of Medina's sociological view in the preceding pages is very schematic, since the concentration by the author into ideal types is compounded by the brevity of this survey. Many theoretical suggestions and erudite digressions which enrich the original texts have had to be excluded in order to highlight the most important propositions, both methodological and theoretical.

At all events, it is obvious that at the beginning he is somewhat disappointed when his analysis leads him to conclude that social classes or groups which could stimulate the development of Latin America do not appear to exist. But instead of depressing him, the certainty of the existing difficulties finally strengthens his faith; he says to himself: "let hope triumph over any scepticism" and he asserts that despite everything "Latin America *fará da sé*". From that moment, the middle of the 60s — both his and those of the century — Medina looks forward, towards the new society, and from then on all his writings will be attracted by the "enigma of the future".

The society of the future will inevitably be the product of human decisions, choices between alternatives, and Medina begins by clarifying which are the most important, both

⁹¹CEPAL document E/CN.12/660, mimeo, pp. 5-6.

⁹²CEPAL document E/CN.12/646, mimeo, p. 19.

⁹³*Ibid.*, pp. 16-17.

in the technico-economic and the political and sociological fields. Leaving the first of these aside, as they are very well known in the relevant literature, Medina sets out four political choices relating to economic development: *laissez faire* or State intervention; open or closed growth; the claims of power or those of the general weal; and, most serious of all, whether the inevitable sacrifice is to fall on some or on all. From the sociological viewpoint there are three choices: whether economic development will be accompanied by reforms in the social structure and to what extent; whether a general spirit of discipline is to prevail; and whether the support and participation of the people will be encouraged. As is obvious, these do not represent "irreducible oppositions" but alternatives between which different possibilities exist. Medina—in his role as a technician—emphasizes that what is important is to choose, to decide, and to do so in such a way that the final result of the choice moulds a coherent picture which will serve to guide action.

In order to make these choices clearer, Medina outlines the two models of society which, in his view, represent the most significant historical 'options' for the developing world: the "Soviet model" and the "Western formula".⁹⁴ And if he already gives indications of his preferences when he sets out the political and sociological options in the abstract, when dealing with those 'historical types' of society he sheds his technical neutrality and declares himself openly for the Western formula. For that reason his reflections on the new society—which encompass the last fifteen years of his life—do not constitute an abstract, neutral shuffling among possible actions, but the defence of his choice of democratic society—a defence which was as passionate as his character, very little given to stridency, would permit.

In defending his utopia of democratic society he warns from the outset that the greatest danger lies in the tendency, which

⁹⁴ He deals with the two models in "Economic development in Latin America—sociological considerations" (CEPAL document E/CN.12/646, mimeo, p. 107 *et seq.*); and in "El desarrollo y su filosofía", in *Filosofía, educación y desarrollo*, *op. cit.*, p. 17 *et seq.*

reappears time and again over the centuries, to sacrifice democracy on the altar of economic efficiency. And this is certainly the reason for which he rejects the Soviet model. "The totalitarian formulae, Soviet and other, may be more efficacious in many eventualities, but a man who is heir to the best European tradition will always prefer the possibility of dialogue or, to put it another way, he will prefer the perhaps intangible value of *legitimacy* to the pragmatism of *efficiency*."⁹⁵ But the idea has also penetrated deeply into many of those who include towards the Western formula, who assume that an authoritarian régime is the purgatory through which the countries which embark on economic development without an appropriate political framework must pass. Medina rejects this idea; for him it is essential to find a path to development which maintains faith in the possibility of democratic coexistence.

"There is always a hope that, even at the eleventh hour, men may arise who are able to turn ineptitude into efficiency, who are able, if need be, to perform a final, saving operation. On the other hand, the complete evaporation of beliefs, the moral collapse that may result from the dissolution of faith—the psychological disintegration of a whole society—can only lead to hopelessness and 'extremism' ... Psychological disintegration implies, at the most, mere selfish resignation, content to gratify its most 'human' and immediate interests, and, at the least, escape to an 'ivory tower', represented, perhaps, by one of the world religions. Let us, then, face this possibility—as is fitting for adult, mature beings—and at the same time let us hope, and still more firmly determine, that it be not translated into fact."⁹⁶

Democracy and planning

1. The defence of the utopia of democratic society is the *leitmotiv* of what was later to be the final stage of his intellectual task. Indications of it certainly exist throughout his work, but from the beginning of the 1960s it begins to stand out as his principal concern, which he

⁹⁵ CEPAL document E/CN.12/646, mimeo, p. 127.

⁹⁶ *Ibid.*, pp. 164-165.

will never abandon. The justification for his defence is simple: if one is going to fight for a new society, it must be worth living in. For would it be worth while fighting for base or ignoble values?

Within his sociology of development the subject of democracy appears for the first time in 1960,⁹⁷ in relation to the institutional conditions which make possible and lay the foundations of the basic social assumptions—motivational and behavioural—underlying any process of economic growth. These economic and political institutional conditions may be very different in nature, ranging between the extreme types of capitalism and socialism, but it is essential that they should have a modicum of continuity and mutual consistency.

The rationalities which structure and guide the economic and political institutions must be compatible—this is the functional principle which orients his initial political analysis. But since in those years he accepted the predominance of economic values in development, he assumed that the technico-economic requirements of development had priority and asserted that the problem consisted in determining the types of political organization compatible with it. Undoubtedly there are types of political organizations which are not compatible with economic development, such as, for example, traditional authoritarianism and populism. No matter how much they might wish to do so, these do not constitute suitable political instruments because often they cannot overcome the incompetence, corruption, ideological confusion and other difficulties which weaken their rationality at both the ideological level and at that of the State institutions. In general terms, the history of the past few centuries indicates that two generic types of political organization have existed which are compatible with economic development: liberal democracy, with its 'original' and 'pluralist' variants, and the forms of modernizing authoritarianism which range from the charismatic régimes of many underdeveloped countries to the régimes of the Soviet type.

⁹⁷In "Relationship between social and economic institutions...", *op. cit.*, especially p. 35 *et seq.* See also the final pages of chapter III of the present study.

But before continuing with the presentation of these two types of political organization compatible with economic development—which rapidly leads to the very heart of Medina's thought—it is necessary to emphasize that with the years he modifies his initial acceptance of the priority of economic values. Up to 1970 he holds that the relationship between economic development and democracy should properly be viewed from the angle of both economic and political values. In other words, if it is fair to ask which types of political organization are compatible with particular economic development objectives—as he does in 1960—it is also reasonable to ask which types of economic organization are consistent with a democratic political order. Thus, he says, this relationship "can equally well be postulated as an analysis of the political conditions of development and as the reverse: i.e., an analysis of the economic conditions of a given political order, democratic in this case...".⁹⁸ In addition, he warns that it is undesirable to linger too long on an abstract proposition which perceives this relationship as one between economic and political rationalities, because, in the final analysis, only a few concrete questions are of interest: given the present economic situation and the intention to develop, what are the most appropriate political instruments for that purpose? or—given certain political conditions which it is sought to improve in a certain direction—what are the most appropriate economic means to do so?

2. Democracy is one of the two types of political organization compatible with economic development, but what should be understood by democracy? Just as there is no single model of economic development, there is no single model of democracy; but, equally, just as all types of economic development have an essential mechanism which they share, democracy has its fundamental principles without which it ceases to be what it is. These principles relate to the existence of a minimum of political representation and respect for the sanctions of public opinion, effective social participation, and the existence and mainte-

⁹⁸In "Discursos sobre política y planeación", in the book already cited of the same name, especially, p. 7.

nance of individual rights. The political participation referred to in the first principle may vary and has varied in its forms over time, since individualist democracy has given way to 'pluralist' democracy. The latter, the only possible form at present, "consists essentially in the political acceptance of the social reality as a complex of highly diverse groups, each with its individual interests and therefore prone to conflicts and disputes with the other groups, but all complying with a common standard so as to seek the most fitting agreement and compromise in each case which arises—in consideration, of course, of its temporary character".⁹⁹ But pluralist political participation, with its varied forms of formal and informal representation, does not exhaust the participation which democracy requires. This participation must also be social in nature, as is indicated by the second principle, and through intermediate groups such as the community, the trade unions and the enterprise, should stimulate the broadening of the horizons of the citizens to encompass the State and its international connexions. This social participation prompts Medina to suggest that 'economic democracy' is an implicit element in the very definition of democracy, but he never developed this knotty subject.¹⁰⁰

Finally, the third principle emphasizes the 'liberal content' of democracy, its 'assumptions based on *jus naturale*'; in other words, the doctrine "that all individuals as persons have specific and inalienable rights apart from and independently of any form of participation: natural, civil, political and social rights...".¹⁰¹

This definition is therefore democratico-liberal, since he links the specifically democratic component of political and social participation with the liberal component of natural rights and the 'state of law', which is the indispensable guarantor of those rights. The two components very briefly sum up the fundamental values which make it possible for existence in society to be worth living.

3. It is not difficult to accept that political democracy and economic development are com-

patible systems, since many historical examples exist which show that they are. However, it is not valid to infer, in Medina's view, that this observable empirical relationship between wealth and democracy means that wealth produces democracy or, to put it in a more complex way, that the achievement of a high level of economic development makes it possible to distribute income, access to education and other economic and social opportunities more fairly and to reduce internal tensions, thus decisively contributing to the establishment of the necessary and sufficient conditions for the existence of democracy.

Medina does not deny that these economic and social conditions can have favourable political effects for democracy, but he believes that democracy is founded on its own values, its 'imponderables', which are in no case a mere by-product or consequence of economic conditions or values. What he suggests tentatively at the beginning he affirms vigorously in his last writings: liberal and democratic ideas stem from conceptions of *jus naturale*, and accordingly have an origin which precedes and is independent of those relating to capitalist or socialist economic development; they were neither formulated nor defined on the basis of economic development, nor did they propose to encourage it directly. Those ideas constitute beliefs concerning political legitimacy; they are, if you will, an illusion, but they have considerable autonomy *vis-à-vis* economic circumstances. For that reason, he opposes to the 'materialistic' relationship between wealth and democracy the 'idealistic' relationship which stresses first and foremost the value of beliefs, "the importance of long-accepted imponderables".¹⁰² Many factors help to weaken or strengthen democratic values and behaviour—as comparative historical analysis shows—but none of them can be raised up to the status of their sole cause. Between the structural conditions and the historical results—let us once again remember this central proposition of Medina's—stands human mediation with its value-based decisions.

This defence of democracy for what it is in itself, as a socio-political value, prompts him

⁹⁹CEPAL document E/CN.12/646, mimeo, pp. 151-152.

¹⁰⁰*Ibid.*, p. 163.

¹⁰¹*Discurso sobre política y planeación, op. cit.*, p. 43.

¹⁰²CEPAL document E/CN.12/646, mimeo, p. 144.

to reject any conception which attempts to base its legitimacy on other foundations. In this regard he expresses his disagreement with M. Weber and J. Schumpeter, who, convinced of the weakness of the foundation based on *jus naturale*, endeavoured to justify democracy by its instrumental value, its capacity, as an institutional procedure, to find responsible leaders or renew ruling teams smoothly. In the same way, he agrees with the radical criticism of the present democracies in the centres, in the sense that the nub of the crisis lies in the fact that the ruling groups have not been capable of maintaining the original principles of legitimacy—built on the values of freedom and equality—and as a result have justified their rule in terms of their economic achievements, the constant expansion of wealth. Medina agrees that democracy is substantially weakened, as a principle of political organization, when it is deprived of its foundations in *jus naturale*, the specific values which gave it origin and meaning, and when it is justified only in terms of its usefulness as a means for achieving given political or economic ends.

4. It has already been noted that the propositions set out by Medina concerning the relationship between economic development and democracy change, between the 1960s and the 1970s, in the direction of increasingly vigorous defence of the relative autonomy of democratic values *vis-à-vis* economic circumstances and values. But in addition a very important change in the intellectual climate of political sciences occurs between those years. At the beginning of the 1960s there was great confidence in the possibility of expanding and consolidating democracy in the countries of Latin America, and in doing so in a way largely consistent and parallel with economic growth. Medina was not so optimistic in those years; rather, the disappointed undertone in his "Economic development in Latin America—sociological considerations"—due to the incompetence or weakness of the middle classes, the insufficient transformation of the agrarian structure, the distortions of populism, and so on—also influences his assessment of the possibilities of democracy in Latin America. At all events, the theoreticians of modernization—those

with whom Medina engages most frequently in a dialogue in his writings on these subjects—were confident then of the future of democracy; Medina only reminds them of the intrinsic value of democratic values and, in the face of the optimism generated in them by the equating of wealth and democracy, underlines his conviction that democratic values will not be achieved as a bonus to economic growth, but must be sought for themselves.

From the end of the 1960s the difficulties faced by the reformist régimes and the reality of authoritarian governments weakened the most solid hopes, and those theoreticians of modernization who believed that the relatively parallel achievement of economic growth and democracy was possible began to question whether democratic institutions which are regarded as embryonic, unstable and immature could support rapid economic growth and bear the transformations inherent in it. In the face of these prospects, and convinced that a minimum level of economic development was a necessary condition for achieving a stable democracy, they believed that it would be best to organize the political systems on the basis of 'mobilization', in other words, the organization and application of all available human resources in a manner which did not exclude political compulsion, if that was considered necessary to achieve the economic objectives. In fact, they proposed to sacrifice democratic political institutions to economic efficiency, convinced that the authoritarian régime would be a transitory episode since the historical process—in the customary terms of the evolutionism of the theory of modernization—would lead to the inevitable achievement of wealth and democracy. Thus, still according to this view, "the economically backward countries cannot follow the traditional paths of the democratic countries in order to overcome their backwardness, and ... for that reason they will not escape an authoritarian period, either as a result of a process of mobilization initiated by a doctrinal group or a charismatic figure, or as the result of an increase in the decision-making capacity of the executive sector of the inherited State".¹⁰³

¹⁰³ *Discurso sobre política y planeación*, op. cit., p. 116.

Medina also vigorously rejects this point of view. Firstly, and in accordance with what was said above, he disagrees with the economism of this view which subordinates the achievement of democratic values to economic growth; secondly, he emphasizes the Weberian view that a stable political order cannot be supported merely by coercion, but also requires the spontaneous consent of the governed, their self-discipline. The latter is evident from an analysis of the historical experience of the authoritarian régimes oriented towards economic development, which shows that the very efforts of these régimes to ensure economic and educational transformations diversify the society and thus facilitate the emergence of forms of conflict and aspirations for democratization similar to those it was assumed they would eliminate. So why should this experience not be taken into account before throwing democratic institutions overboard? Finally, this view appears to vary in its applicability depending on the level of development of the democratic values and institutions achieved by each country at a given moment; in fact, it seems even more regrettable and inappropriate to disrupt democratic institutions and beliefs when—as in many countries of Latin America—they have already been maturing for many years. But Medina is consistent to the end: even in cases of little or no democratic tradition it would be advisable to start along the path of development hand in hand with democracy, since as many historical cases show, when democratic ideals are strong they can help to make bearable the social and political disruption and maladjustment produced by economic growth because of its ups and downs and the structural transformations it brings with it.

5. Economic development, as a process relatively open to human decisions, means choosing between technico-economic, political and social alternatives, and Medina emphasizes time and again, from the beginning of his sociology of development, that planning must play a fundamental role in preparing for, making and implementing these choices. For that reason there should be no surprise at the preference he gave to this subject in his last years and his lengthy explorations of the rela-

tionship between democracy and planning; in fact, planning is a special form of looking at economic development, which accentuates its political components by considering it as a process of decision-making and implementation. But the greatest attraction that the subject of planning has for Medina is that through it he once again engages in dialogue with some of his favourite interlocutors: with Comte and his hope of achieving a rational ordering of society; with Weber and his prophetic vision of a disillusioned world, where the excesses of instrumental reason threaten the freedom of man; with Mannheim and his conception of planning as the instrument of a total transformation of society to achieve the broadening and defence of freedom.

Democracy, as has already been pointed out, is worth while for its own sake, because of the values which it embodies, which are founded in the principles of *jus naturale*. This is the final bastion of the position which Medina defends; but there are other, earlier bastions which also help to sustain democratic ideals by pointing to their instrumental value for economic development. This is so, in principle, in the case of Medina's reflections seeking to demonstrate that democratic planning is possible because there is no fundamental incompatibility which prevents the planning of economic development from being carried out within a democratic political system.

However, the defence of democratic planning encounters difficulties linked with the fact that there exist other components of planning, the technical and administrative components, which have also attempted to shape it in their image and likeness, giving rise to what Medina calls 'bureaucratic' and 'technocratic' utopias of planning.¹⁰⁴ The utopian component of both consists precisely in the fact that they claim to concentrate the power involved in the decision-making process of planning in the hands of their respective social supports: bureaucrats and technicians. The bureaucratic utopia holds that the bureaucracy must have the decisive role in planning, since planning cannot function efficiently without the rational

¹⁰⁴ See "La planeación en las formas de la racionalidad", in *Discurso sobre política y planeación*, *op. cit.*

apparatus provided by the bureaucracy; the expansion and consolidation of rational administration do indeed accompany and underpin the formation of the modern State and the development of the economy. But technicians and scientists maintain that they, or science and technology alone, have at least as good a record as bureaucracy to justify their directing planning; in order to prove this assertion, they say, it suffices to glance at the role they have played in the economic and political process in recent years.

The realization of one or other of the utopias is not a simple matter, since it requires the satisfaction of some socio-political and cognitive conditions which are difficult to realize in present circumstances. Firstly, it calls for the acceptance or imposition of the intellectual supremacy of either the bureaucracy or the technocracy, for which purpose they must be capable of showing irrefutably that the knowledge they can attain is absolute and sufficient; secondly, it is necessary for this intellectual supremacy to be converted into political supremacy, defeating the other groups which are also fighting for power, and, finally, the bureaucrats or technocrats must succeed in legitimating the resulting socio-political order made up of an enlightened—bureaucratic or technocratic—élite and the subject masses.

At all events, Medina deals with both utopias in detail, since they are present in many of the prospective analyses which are being carried out in the developed countries, and stand at the centre of many sociological and philosophical polemics. Furthermore, he wishes to contrast them with the democratic utopia and, in passing, to launch a few darts at those in Latin America—and there are not a few of them—who have technocratic or bureaucratic illusions. Science, technology and administration, in Medina's opinion, play a fundamental role in planning, but, at least for the moment, they cannot dream of achieving a monopoly of power in the short term, still less believe that through them it will be possible to achieve the hope of shifting from complex power relations among men to the straightforward administration of things.

The democratic utopia of planning reaffirms the political component which the other

utopias believe they can overcome, and maintains that the decision-making power in planning should in the final analysis rest with the people and its political representatives. In an extreme version, which rejects the role of the scientists, technologists and bureaucrats, it is obviously unattainable. But as regards its view of the final depositaries of political power, it has much better arguments and background than the other utopias to legitimate itself.

The specific question which is of interest when considering the possibility of democratic planning is: can planning, with its characteristic institutional techniques and mechanisms, fit within the democratic system? Medina replies in the affirmative, since he believes there is no incompatibility between their political structures or functions. Rather, he asserts that they share some very similar political functions, such as those of articulating values and linking them with the objectives aimed at and the means of achieving them; maintaining and making possible socio-political communication through participation; discovering gaps and inadequacies in resources, and hence promoting their creation and rational allocation; and constituting symbols of legitimacy to guide the attitudes of the population.

But, in particular, democracy is a system of choices which articulates the alternatives that arise in all the important spheres of the life of a society and supplies channels for participation in the decisions referring to them, and there is no structural obstacle to its also including the economic choices specific to planning in its institutional machinery. Clearly, Medina does not deny that there are concrete difficulties in this process, but he emphasizes that they do not derive from any assumed inconsistency between the basic principles which orient both democracy and planning. However, consistency between the institutions and machinery of either—their 'structural relationship'—should not be sought only at the level of the Parliament and the central State apparatus, for the relationship of planning to the economic, social, regional and community interest groups at all the stages of plan formulation and implementation is also of importance. At all events, Medina believes that as long as the party system functions

acceptably it should constitute the principal area where the fundamental economic choices are compared.

6. The set of activities which go to make up economic planning include, to a greater or lesser degree, the most important types of rationality whose social bearers are the protagonists of the utopias outlined. Of course, each of them —scientists, technologists, bureaucrats and politicians— participate to some extent, during the exercise of their activities, in all the types of rationality, but one is specific to them and defines what is typical in their role in planning.

The technologist is guided in particular by the instrumental or technical rationality, which is, essentially, that which endeavours to supply the most appropriate means to achieve an end, or, given certain means, tries to maximize the results, or attempts to predict the consequences of an action. In his activities he pays special attention to the means or instruments to be used for the achievement of objectives which he has not selected himself. The aims and objectives, the future image of the society which it is wished to create, the criteria which guide the diagnosis, have not been established by him, and he restricts himself to preparing models or strategies for action in accordance with guidelines given to him beforehand.

The bureaucrat is guided in his rational activities by specific 'procedures' laid down by norms and regulations; he also of course knows something of the reality of the things involved in his activities, but his typical rationality is the 'functional' rationality, which organizes the implementation of an activity in accordance with certain administrative procedures whose establishment and modification in the final analysis fall outside his strict competence. The politician develops in his activities a 'political' rationality which is divided into two forms: firstly, it has the principal task of taking decisions concerning the ends which guide planning as a whole, and secondly, it must rationally organize the functioning of the entire process of negotiation linked with the taking of decisions.

Now, if one may be permitted a perhaps excessive simplification of Medina's thinking

on this complex subject, one may affirm that in reflecting on these different rationalities he returns to his profoundest existential problems. In the first place, he expresses his fears that such growth may take place in the technical and functional rationalities that it will finally impose their criteria —of bureaucratic and instrumental 'efficiency'— in spheres of life which should be governed by their own autonomous values. In that regard, he repeatedly underlines the indispensable role of politics in planning, as a decisive affirmation of a value content and a hope for material rationality; nothing is more foreign to his beliefs than the alleged 'futility of politics'. Secondly, he expresses his defence of democratic principles as basic criteria which should structure and guide this necessary political rationality.

The undeniable challenges raised by the development of reason have led many philosophers and sociologists —and also many youth protest movements— to maintain that industrial society is moving towards an impasse as a result of the unrestricted predominance of technological reason, which has gone beyond the sphere of technology and economics and now seeks to dominate all human activities to the detriment "of other forms of reason, not only historical and vital reason, but that sole original and all-embracing reason which provides a basis for man's permanent critical reflection on himself and his own creations: the Reason which gave birth to the enlightened thinking of ancients and moderns".¹⁰⁵

In the face of this 'one-dimensional' social organization, which threatens to destroy all human freedom, all that seems possible is "radical resignation" or "a desperate attitude determined to resolve the problem fundamentally once and for all". Medina is not in agreement with these attitudes: he accepts that the process of rationalization has undesirable socio-political effects, but the reaction to them should not be resignation or apocalyptic destruction. Rather, the task involves "firmly bringing into play a powerful creative imagination capable of devising at the appropriate time the various political and economic in-

¹⁰⁵ *Discurso sobre política y planeación, op. cit., p. 87.*

struments for negotiation and commitment which are capable of overcoming it effectively".¹⁰⁶

The process of rationalization is a universal trend in our time which has made it possible to palliate the scourges of poverty and premature death. We cannot go backwards, rejecting progress. But neither is prosperity sufficient in itself, and for that reason it is necessary to check the excesses of these manifestations of reason and fight against the ambitions of technocracy, economism and bureaucratization. In this fight it is necessary to avoid desperation; fortunately, the scientist, the technologist and the politician can be well prepared if they have learned to respect the dictates of their own rationalities, which teach them the distance which stands between the desirable and the impossible. If they are mature they will know that the hope for a better society lies in "the rigorous analysis of scientific intelligence, the critical consideration of enlightened discourse and the pragmatic orientation of prudence as political reason".¹⁰⁷

In short, if Medina had permitted himself to give a piece of advice, he would have said that in the present circumstances of Western culture —of which Latin America is a full member— the most important objective is to defend democratic values and institutions both from their traditional enemies and from those who, in the belief that they are defending them,

mistakenly defer them to an uncertain future when propitious economic and social conditions exist for their establishment. To be a democrat means to uphold their intrinsic principles now, fighting to recover them effectively. If institutional maladjustments exist because parliament, the parties, the electoral system or any other of the institutions do not function properly, the required reforms or changes must be made in them, without rejecting the principles on which they are based. If an 'overload' of demands occurs as a result of the growing political participation encouraged by the economic and social changes, the solution is not to eliminate some of them in a repressive manner, but to educate the citizenry with a view to "bringing about a change in the currently impaired or downright perverted attitudes of individuals and other social units with respect to the State".¹⁰⁸ Finally, if democratic pluralism produces conflicts, it should be remembered that "every liberal-democratic conception of the political system tends to accept as its point of departure the existence of opposing interests and ideological positions which cannot be finally reconciled at the dictates of an absolute truth possessed as such, but can only come to temporary arrangements, successively amplified to meet the needs of the moment, and worked out through agreement, compromise and mutual moderation of incompatible extremes".¹⁰⁹

V

Conclusion: Taking stock and looking forward

1. In 1974, when he was already over 70, Medina left his post in the United Nations and moved to Spain. He planned the trip as a final return after spending half his life in Spanish America, but for reasons which it is not appropriate to discuss here, he remained in his country only a couple of years, after which he

resettled in Santiago, Chile, and wrote his last essays for CEPAL.

During this European interlude, because of his renewed close contact with European realities after so much time, he readjusted his intellectual perspective and organized his problems, approaches and theoretical sugges-

¹⁰⁶*Ibid.*, p. 92.

¹⁰⁷*Ibid.*, p. 92.

¹⁰⁸"Notes on the future of the Western democracies", *CEPAL Review*, N.º 4, *op. cit.*, p. 133.

¹⁰⁹*Ibid.*, p. 127.

tions in a way which was to become definitive.

In principle, he once again found himself face to face with crisis, with the widespread feeling in intellectual circles of living through a critical time. He felt the presence of a "negative tone of feeling" because of the lost illusions of the post-war period and, though he might disagree on the causes of the crisis, he agreed that the end of an era had arrived.

This awareness of crisis encompasses very diverse areas, but there are two which Medina underlines with special emphasis: the crises in traditional conceptions of development and of the international order.

The crisis in the idea of development began to germinate some time ago; it began with criticism of the conception of development as pure economic growth and a call for its scope to be broadened by adding to it the ideals of human welfare proposing greater fairness in distribution—"narrowing the gap"—both between countries and between regions and social strata within countries. This initial criticism and combination are later joined by a concern at waste, with its salient features of superfluous consumption, squandering on arms and the exhaustion of non-renewable resources, and denunciation of the destructive action which development has brought with it, with consequent ecological deterioration and decline in the quality of life. In their extreme version, these criticisms propose 'other' types of development, which totally reject the traditional conception and seek the creation of a society which is thrifty, fair and capable of meeting the basic needs of all.

The traditional conception of the international order, which originated in the seventeenth century in Europe, is based on the existence of territorially sovereign States whose principal criterion for action is their own *raison d'Etat* and which maintain between each other relations based on various forms of distribution and exercise of political and economic power—dominance of the strongest, balance of power, and so on—regulated precariously by international law, which has never been able to achieve full compulsion. This type of international order is entering a crisis because problems are arising whose

solution cannot be achieved by a single State or a few States, and because forms of international relations are emerging which spread beyond the borders of the States, such as intergovernmental bureaucracies, regional associations and communities, and transnational enterprises.

But behind these important manifestations of the critical consciousness, Medina discovers the old subjects—"his" old subjects—which once again lead to the discovery of "the drama of Western culture". The thread which links all of them, old and new, is the perennial struggle for freedom, the "repeated fight to avoid or limit the various forms of coercion to which the individual is subjected ... it is a criticism of authority, in its different manifestations in our reality ... in the conditions of national or international life".¹¹⁰ In this way there reappear both the hope that the development of reason will bring with it the conquest of poverty, disease and premature death and make it possible to achieve full human advancement, and the threat that the unilateral predominance of one of the forms of reason will culminate in the coercions of technocratism, bureaucratism, political absolutism and economism. In short, there reappears his persistent concern to ensure that the essential process of rationalization does not subordinate or prevent the meeting of the "moral and aesthetic needs of the individual, his effective desires, the quality and dignity proper to human life and the permanent yearning for communication".¹¹¹

In the face of these problems, old and new, salient and profound, Medina specifies the basic elements of the appropriate approach to tackle them, for the purposes of both investigation and action. Firstly, he emphasizes the need to adopt a universalist attitude which makes it possible to achieve a global viewpoint; this attitude is founded on the fact that all the parts into which the present-day world can be divided are interdependent, that their crucial problems are universal, so that efforts

¹¹⁰"Las propuestas de un nuevo orden internacional en perspectiva", *El Trimestre Económico* (Mexico), Vol. XLV, N.º 179 (July-September 1978), p. 534.

¹¹¹*Ibid.*, p. 540.

to solve them should also be universal, and that the 'compact whole' of the social circumstance of man is not a national society or a region but the world as a whole. Secondly, he emphasizes the need for a prospective orientation which endeavours as far as possible to lessen the indetermination and uncertainty always involved in the "enigma of the future"; this perspective orientation should avoid the extremes of "impatient pragmatism" and the construction of irrelevant utopias. Utopias are necessary and the lack of them "may perhaps be indicative of a serious inadequacy in the interpretation of the present",¹¹² but, in so far as one is a mere witness or minor protagonist, one must not undervalue the realistic analysis of what 'can' be done in given objective conditions. Thirdly, he points to the importance of power relationships at the international level, since they have a substantial influence on the nature of the major universal problems and the solutions which could be found to them, and constitute the indispensable framework which limits any concrete national or international analysis or action.

These basic components—the universalist attitude, the prospective orientation and the dominant influence of international power relationships—are present in much of modern academic and political thinking, but they are not original. Medina suggests that behind them stands the old conception of sociology as the reflection of an era critical of itself, as the "self-awareness of a historic moment"; a conception which attracted him so much at the beginning of the 1940s under the influence of H. Freyer.

2. The implicit balance sheet drawn up by Medina, stimulated by his stay in Europe, convinced him that while there exist at the present time problems and approaches which respond to the specific challenges of the moment, they are also closely related—as could hardly be otherwise—to the intellectual and political concerns and efforts which have been taking root for a long time in the heart of Western culture.

However, in his final years, he is convinced that the problem of peace stands out above the remaining problems and has decisive influence on them; his thesis is that all the important issues of the present era depend on how world peace is achieved and consolidated. The problem is obviously not new, and Medina himself had already tackled it towards the end of the Second World War,¹¹³ but he now returns to face it with renewed vigour, aware of the dangers which total war would involve.

Thus, he dedicates a good part of his last efforts to an analysis of the changes which have occurred in international relations in recent decades, and he does so in a way which has certain formal similarities with that which he sketched in relation to development in Latin America. In fact, these changes are conceived as if they had a leading tendency: the transition from the structure of relations of the cold war to that specific to *détente*, and the latter, like development, is both a historical tendency, a continuing process, and an ideal for which it is worth fighting and which will only be attained by means of human effort.

The structure of relations specific to the cold war is based on the confrontation between the two principal contenders, which assumes the nature of total antagonism. Discouragement of open confrontation between them lies in their military 'parity' and in their shared fear at what would be its inevitable result: the 'holocaust' of humanity. Both contenders represent and propound socioeconomic systems that they perceive as absolutely antagonistic, which gives dogmatic rigidity to the ideas and institutions guiding any internal and external policy, so that they become 'pillarized'. This inflexibility, which affects not only the principal contenders but also the many who cannot avoid their influence, together with the nuclear threat, do not, however, prevent both from obtaining distinct successes in their economic growth; perhaps as result of their "open emulation".

Détente means a general relaxation of tension at the international level and the firm

¹¹²"Latin America in the possible scenarios of *détente*", *CEPAL Review*, N.º 2 (second half of 1976), p. 19 (United Nations publication, Sales N.º: E.77.II.G.2).

¹¹³*Consideraciones sobre el tema de la paz* (Mexico City, Banco de México, 1945).

establishment of the foundations of durable peace. In Medina's view, tension has lessened a little in recent years and positive steps have been taken towards *détente*, but there is still an objective possibility of a freezing of the present situation (competitive *détente*), a backsliding towards previous stages typical of the cold war (conflictive *détente*), or a move forward to durable and harmonious peace (co-operative *détente*).

Medina places all his hopes in the latter. However, he does not conceive it as a permanent and absolute final stage but as a target whose achievement would not only be valuable in itself, but would open up new economic, political and cultural prospects at the international and national level.

From the viewpoint of international political relations this would make it possible to leave behind the old system of security policies based on the defence of national sovereignty, in favour of a globalist or universalist approach aiming at genuine world interdependence: the consolidation of this tendency would permit both growing flexibility in international actions — 'desatellization' — and the establishment and strengthening of world authorities to deal with problematical issues, as well as the reduction of localized wars. As for international economic relations, the most important consequences would take the form of a general attitude of co-operation, the expansion of the international market and the predominance of multilateral over bilateral relations. At the national level it would produce two effects of the greatest importance: firstly, international concord would promote the formation and strengthening of democratico-liberal régimes; and secondly, it would contribute to "ideological decentralization". This process, by destroying the previous rigidity, would stimulate the search for new ideas and policies and their application in development strategies and permit the application of measures which are more flexible, pragmatic and adaptable to specific circumstances.

In short, democracy at the national level and co-operative *détente* at the international level are the two banners which constitute the essence of Medina's axiological legacy. Do they merely represent the optimistic and

utopian enthusiasm of a man of good will? Perhaps, but such men "like those who believe in Reason ... continue to be the salt of the earth".¹¹⁴

Note on José Medina's academic background

Medina was born in Castellón de la Plana (Spain) on 25 December 1903. He studied in the National Institutes of Valencia and Barcelona (1914-1920), and in the Universities of Valencia and Madrid (1920-1926), obtaining the title of Doctor of Jurisprudence. Later he was a Fellow in the University of Paris (1926) and Reader in the University of Marburg, Germany (1931-1932). On his return to Spain he was Legal Officer to the Cortes (1932-1936) and Professor of the Philosophy of Law in the University of Murcia (1934). During a large part of the civil war he was Secretary and later Chargé d'Affaires in the Spanish Legation in Warsaw, Poland (1937-1939).

Exiled in Mexico, he was Editor of the Colección de Sociología of the Fondo de Cultura Económica (1939-1944); Professor of Sociology in the Autonomous National University of Mexico (1939-1944); and Professor and Director of the Centre for Social Studies and Director of the publication *Jornadas* in the Colegio de México. Following a short period as visiting Professor in the National University of Colombia (1945), he became Professor of Sociology at the University of Puerto Rico (1946-1952). On 1 August 1952 he began his work in CEPAL; first as an Editor (1952-1955), but later moving on to duties relating to social development. In 1957-1958 transferred to UNESCO to become the first Director of the School of Sociology of the Latin American Faculty of Social Sciences, returning to CEPAL in 1959-1963. On 30 November 1963 he joined the Latin American Institute for Economic and Social Planning (ILPES), where he was Director of the Social Development Division until his retirement on 30 June 1974. After spending some time in Spain he returned to Santiago, Chile, and co-operated with CEPAL until his death on 13 November 1977.

¹¹⁴"Latin America in the possible scenarios of *détente*, CEPAL Review, N.º 2, *op. cit.*, p. 19.

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**This study was prepared by Medina in co-operation with L. Ratnoff and E. Faletto and submitted as a CEPAL secretariat document to the tenth session of CEPAL, held in Mar del Plata, Argentina, in 1963. The parts of the document used in the text are some of those written by Medina, such as the Introduction and the first three sections of Chapter IV on the middle classes.

***Published in English as “Relationship between social and economic institutions: a theoretical model applicable to Latin America”, CEPAL, *Economic Bulletin for Latin America*, Vol. VI, N.º 1 (March 1961), pp. 27-39.

*This bibliography is not exhaustive. The dates in brackets show the year in which the article or book was completed, which is not necessarily the same as the year of publication. The incomplete references are to books which it was not possible to obtain when writing this essay.