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Review

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Medina Echavarría and the future of Latin America

Adolfo Gurrieri*

1. *The riddle of the future*

Of the diverse possible avenues of approach to an exposé of Medina's thinking, the one I have chosen on the present occasion, when we have met to reflect upon the future of Latin America in the light of some of Medina's main ideas, opens with a question that probably he himself would have refused to answer: how ought we, as social scientists, to face the challenge of probing into Latin America's future and guiding its course? In all likelihood his refusal would have been due not only to his modesty and his well-known reluctance to give advice, but also to the fact that the complexity of the matter in hand would have allowed him to give only a schematic and perhaps superficial reply. At all events, perhaps as one of his disciples I may be allowed, at this time of commemoration, to exercise the freedom that he himself would have forgone.

I think if Medina had begun to answer that question, he would have done so by pointing out that any sociologist interested in the phenomena of social change takes his stand, even if he does not say so, on a theory of development over the past, on a conception of history.¹ He considered that the history of Latin America was a fragment of the history of the West, since the process of transculturation which began with the Spanish Conquest went so deep that it converted the one into a part—often an active and creative part—of the other, and the essential feature which made the history of the West meaningful was the process of rationalization of which economic development and social and political modernization were comprised. Rationalization, however, was not an inexorable trend. The history of a

people might perhaps reveal evolutionary trends which would seem to be gradually leading it towards an objective; but such trends were the product of that same people's effort, of its members' strivings in that particular direction, not of a supposed autonomous dynamism of other than human forces.

Medina says the historical process can be conceived as a combination of necessity and freedom, conditioning and spontaneity. Every people possesses material, technical, social, political and cultural features which, while containing a range of options, establish the bounds of possibility, the frontier of what is objectively feasible. Which of the optional courses is ultimately followed will depend upon the choices and decisions of the people concerned. Accordingly, the progress of humanity, in Medina's opinion, is not determined by fate, but will always be the result of a free and spontaneous act within the framework of a fatality. In his view, the "riddle of the future"² cannot be fully solved, but neither are we at the mercy of inscrutable processes. The past of a people and its present conditions may indicate the basic trends of its orientation and to the possible and perhaps probable courses of its future, but that future cannot be predicted with certainty, since between the basic conditions and trends of a society and its future steps in human intervention, which imparts to history its degrees of freedom and indetermination.

Man has often believed in his ability to unveil the mysterious future, and these hopes—says Medina—are evidenced in religious prophecy and scientific prognostication. But he suggests the more modest method which consists in examining the structure and trends of a situation on the basis of certain criteria, in order to facili-

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1 José Medina E., *La sociología como ciencia social concreta*, Madrid, Ediciones Cultura Hispánica, chapters xv to xviii, 1980.

2 *Ibidem*, "Desengaños del desarrollo", in *Discurso sobre política y planeación*, Mexico, D.F., Siglo XXI Editores, 1972.

tate the choice between alternative courses of action. In his last studies³ he urges the need for a forward-looking orientation which seeks to attenuate as far as possible the indetermination and uncertainty that the future always involves. This forward-looking attitude should avoid the excesses of immediatist pragmatism and of construction of irrelevant utopias. He believed that a utopia was necessary and that its absence betrayed great poverty in the interpretation of the present, but he also believed in the importance of realistic analysis of what could be done in given objective conditions.

If history is, in essence, the result of a dialectic relation between acts of freewill performed within a framework of fatalities which have largely been created by men themselves, among the main elements on which such acts are based are the values that are upheld by the social actors. Medina often points out that the fatality of circumstances defines the scope of what can realistically be desired, and in its definition science can offer very important support. But science cannot show us what we ought to desire nor what are the criteria or principles on which we should base our conduct. This choice of values, however, is not a task beyond reason, since in Medina's opinion it is one proper to philosophy.

Suffice it for the moment to keep in mind the idea, of Weberian stock, that values, even if cramped by circumstances, are decisive elements in the orientation of social action. Medina, as a social scientist, was interested in the social actors' values, because from knowledge of them some glimpses of the future could be caught. But of course, he too had his values to which I should like to refer now, since they impregnate and decisively influence the whole of his work. I shall refer (and that very briefly) only to some, not all of the values that are of importance in Medina's thinking.

2. International co-operation

The first of these values can be summed up in the ideal that in international relations co-operation should predominate, "co-operative détente". I

³See, especially, "Las propuestas de un nuevo orden económico internacional en perspectiva", in *La obra de José Medina Echavarría*, Madrid, Ediciones Cultura Hispánica, 1980.

give it first place because Medina maintains, like many ECLAC economists, that international power relations considerably influence the nature of the great world problems and the solutions which can be found for them. These relations therefore constitute an element of fundamental significance in the circumstances that condition any concrete action. He asserts, indeed, that all the burning questions of the present age are dependent upon how far international co-operation is achieved and perfected. In studies written in the mid-70s⁴ he analyses the changes that have taken place in international relations and believes a main trend is perceptible that leads away from the structures proper to the cold war and towards those of co-operative détente. This latter implies a general slackening of tension at the international level and the laying of firm foundations for lasting peace. Of course, such a trend is by no means inevitable and therefore does not preclude the possibility of regressions towards states of greater antagonism between the leading powers. If a high degree of co-operative détente were attained, it would have supremely important effects on international relations in the economic and political spheres, and also at the national level. In this latter case, it would permit the formation and consolidation of democratic régimes and what he called "ideological decentralization", which, by breaking down the doctrinaire rigidity characteristic of the cold war, would make it possible to seek and more freely apply development strategies adaptable to the conditions and values predominating in the real life of individual countries.

3. Economic development

The second of Medina's ideals to which I want to refer is that of economic development. It would be particularly pretentious to attempt a synthesis of this ideal. A few marginal notes, at least, may be of some service. Medina was especially concerned with the cultural criticism of industrial society which flourished in the central countries as from the 1960s, and stressed all the

⁴See, in particular, "Latin America in the possible scenarios of détente", *CEPAL Review* No. 2 (second semester 1976). Also published in *La obra de José Medina Echavarría*, *op. cit.*

negative aspects of economic development.⁵ However, he never allowed himself to be ensnared by the idea that it would be desirable to consider a future in which economic development did not play a central role. Following Heymann,⁶ he drew attention to inescapable aspects of the supposed happy life of backward societies, throughout history, such as hunger, disease and premature death, which were the demons that economic development came to exorcise. He therefore regarded rational organization of the economic process as inevitable, with the primary aim of increasing wealth, which was the essence of economic development, but not without the maintenance of critical watchfulness, stemming from the conviction that, as demonstrated in the more developed societies, the logic of the process involved undesirable consequences, which could be anticipated and averted by societies that were following behind.

On the basis of this critical conception of economic development, Medina asked himself what characteristics the Latin American peoples ought to give to their own development, what might be the specificity of the Latin American orientation of development, and to what aspects special attention ought to be devoted. I should like to underline three points in his reply.⁷

First, Latin America should make an effort to change the anarchical and exploitative conditions prevailing in the international market; a question of the international co-operation to which I have already referred. Secondly, in human progress, social development should keep pace with economic development. Latin America ought to take time by the forelock, reorienting its economic development in the direction of equity without waiting, as happened in the developed countries, for this reorientation to be brought about over the long term, by way—as he used to say—of humiliation, conflict and fear. Moreover, social development should be envisaged not as a mere palliative making up for the negative aspects of economic development,

itself. By way of example, he often pointed out the importance of political and, in particular, educational conditions; educational development would make it possible gradually to close the scientific, technical and administrative gaps which were, in his opinion, the most important of the several existing between the central and peripheral countries.

Lastly, on the basis of the expectations shared by Weber and Marx, he underlined the importance of the efforts that had to be made to ensure that economic development would permit, at one and the same time, material prosperity and the emancipation of man; to which end the values by which economic development was guided would have to be integrated with other values, such as that of liberty: a task in which the spiritual power of the university should play a decisive role.

4. Democracy and planning

Another of the ideals of importance in Medina's thinking, the third that I wish to mention, is that of democracy. He considered that democracy presented two main dimensions. Firstly, the validity of natural rights—civil, political and social—and of the rule of law by which they were sustained; and, secondly, the existence of full political and social participation. In several of his writings on democracy,⁸ Medina campaigned in particular against a viewpoint of especially wide currency in development and modernization theories. This view presupposed, in the first place, the subordination of political to economic values, so that in formulating an overall conception of development, an endeavour was made to find the types of political organization that were compatible with the proposed economic development, rather than the other way around. It also presupposed that the aforesaid primacy of economic over political aspects was further manifested in the sphere of action; the pursuit of democracy ought to begin with the creation of its economic underpinnings, not with

⁵See "El desarrollo y su filosofía", in *Filosofía, educación y desarrollo*, Mexico, D.F., Siglo XXI Editores, 1967.

⁶See Edward Heymann, *Teoría social de los sistemas económicos*, Madrid, Ed. Gredos, 1970.

⁷See "El desarrollo y su filosofía", *op. cit.*, chapter v.

⁸See, in particular, "Notes on the future of the Western democracies", *CEPAL Review* No. 4, second half of 1977. Also reproduced in *La obra de... op. cit.*

the development of the values and institutions of democracy itself. Lastly, on the basis of a conviction that simultaneous attainment of economic development and of democracy would not be possible, and given the latter's unstable, incipient and immature character, it posited that the political systems best adapted to economic development would be those based on disciplined and, if necessary, authoritarian mobilization, immolating democracy on the altar of economic efficiency.

In his last years Medina constantly battled against this point of view. He saw no reason whatever for subordinating political to economic values, and believed that, just as it was possible to envisage a political system most appropriate for achieving a certain type of economic development, so it was equally legitimate to ask oneself what type of economic organization would be most consistent with the validity of democratic principles. It seemed obvious that specific economic and social conditions could have effects that were favourable to democracy, but the latter was founded on its own values, on what Medina called its "intangible validities", which were in no degree the byproduct of economic and social conditions.

Liberal and democratic ideas had had their origin in the conception of natural law; they were of earlier date than economic development and independent of it; they had not been formulated in relation to it, nor were they intended to promote it directly. Therefore, over against the "materialistic" relation between economic development and democracy he set the "idealistic" relation, which stressed above all the value of beliefs and principles. Democracy must not, even temporarily, be sacrificed to economic development. Being a democrat meant defending its intrinsic principles here and now, while striving after their effective recovery. If institutional distortions existed, because parliament, the parties, the electoral system or any other of the institutions did not function properly, what should be done was to introduce the necessary reforms or changes in them, not to abjure the principles on which they were grounded. If an "overload" of demands were created as a consequence of increasing political participation, fostered by economic and social change, the solution did not lie in repressively stamping out any of

those demands, but in educating the people with a view to "bringing about a change in the attitudes —currently impaired or downright perverted— of individuals... with respect to the State".⁹ If democratic pluralism gave rise to conflicts, it had to be recalled 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, through agreements, compromise and mutual moderation of incompatible extremes".¹⁰

Medina's ideal of democracy is combined with that of planning. Historical development, in so far as it is a process relatively open to human decision, implies choosing between alternatives, and in the tasks of formulating, deciding upon and executing the options concerned, planning can and must play an essential part. In formulating his ideal of planning, he once again propounds some of his favourite themes: the hope of attaining an orderly and rational organization of society; the idea of planning as an instrument of social change which will increase and uphold liberty; and the Weberian vision of a disillusioned world in which the extravagances of instrumental reason threaten the freedom of man.

Democratic planning was, in reality, his ideal, and in very interesting passages of which I cannot speak now,¹¹ he draws a contrast between the bureaucratic, technocratic and democratic planning utopias, for the better support of his own ideal of democratic planning.

5. Concluding remarks

I should like to conclude with three additional remarks on Medina's ideals.

In the first place, for Medina his ideals represented the point of departure of the social

⁹*Ibidem*, p. 133.

¹⁰*Ibidem*, p. 127.

¹¹To be found mainly in *Discursos sobre política y planeación*, *op. cit.*

scientist's work, not the point of arrival. He believes that his ideals are at once desirable and possible, but that analysis of actual situations and trends will invariably point to the distance between the ideal and the reality; and that it will also suggest which options would seem most likely to be practicable. In fact, study of the options open to human action on the basis of certain values, and of the degrees of feasibility of each one of those options, constitutes, in Medina's opinion, one of the principal tasks of social science: a social science which ought to be the compass by which to steer human action and the reconstruction of society in crisis. If it is to perform that role, social science ought to rid itself of three persistent defects. Firstly, want of rigour: that was why Medina always placed so much emphasis on its scientific character. Secondly, the belief that valuational neutrality is a prerequisite for scientific objectivity. The scientist must analyse and defend values, without lapsing into dogmatism or belligerence. Hence his idea of the scientist's responsible participation, based on an ethic of intellectual responsibility, in which the scientific attitude and commitment with social problems are combined. Thirdly, the tendency to formulate over-abstract and over-specialized theoretical constructs. Abstraction and specialization are, of course, necessary, but he recommends avoiding abuse of what he called "intellectual mountaineering" and "barren specializing". Thus, he ponders deeply on the approaches and objects of analysis that will enable sociology to provide integrated and concrete information.¹²

In the second place, Medina's ideals are manifestations of reason: expressions of the rationalization process with respect to historical trends, and of the ideal of the validity of reason with respect to values. Accordingly, from an abstract standpoint, examination of the conditions of possibility of the values Medina upheld was prompted by a vital question that was with him throughout his life. Writing in the early 1940s, he asked: "Is the intolerable state which our civilization has come to now susceptible of a rational cure? or must we surrender ourselves,

bereft of hope, to the mere interplay of blind forces?"¹³ How can we cope with this chaotic disorder? How are we to resume the march of our history, without destructive upheavals?"¹⁴ International co-operation, economic development, democracy and planning represent aspects of the two predominant kinds of reason, the formal or instrumental and the material or substantive. It would be impossible to expound even the main ideas of Medina on the subject, but at least it may be noted that while he was convinced of the positive role that reason could and had to play in individual and collective human activity, he was also aware of the obstacles that prevented the free exercise of reason, of the limits to what it could give us, and of the perils of its excesses. In his study of the chiaroscuro of the exercise of reason, he assigns a key role to interaction between its formal and material branches, a theme which of course I can do no more than mention here.

Thirdly, I should like to speak of his attitude towards his own ideals. Medina was a man very little given to noisy trumpeting in the defence of his ideals, but his life and writings clearly show that he was a man of strong convictions. Not even the disillusionments attendant upon the time in which it fell to him to live, or the pessimism that often accompanies maturity, sufficed to make a dent in his convictions. He knew the world too well to be an optimist, but he was likewise too convinced of the rational capacity of man to let himself be carried away by pessimism. His writings are full, at one and the same time, of affirmations of value, of somewhat disillusioned observations regarding the possibility of living up to them, and, lastly, of words of encouragement—to himself, I imagine, and to others—, of exhortation, despite everything, to keep the flags flying. Such a passage appears in *Consideraciones sociológicas sobre el desarrollo económico*: "There is always a last hope that, even at the eleventh hour, men may arise who are able to turn ineptitude into efficiency, who are capable, if need be, of performing a final, life-saving operation. On the other hand, the complete evaporation of beliefs, the utter moral collapse

¹²See, in particular, "Reconstrucción de la ciencia social" in *Responsabilidad de la inteligencia. A study of our times*. Mexico, D.F., Fondo de Cultura Económica, 1943.

¹³See "En busca de la ciencia del hombre", *Responsabilidad de la inteligencia*, op. cit., p. 29.

¹⁴See *Responsabilidad de la inteligencia*, op. cit., p. 16.

that may be implicit in the dissolution of faith—the all-pervading anomy of an entire society—can only lead to hopelessness and extremism. Anomy 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 great world religions. Let us, then, face

this possibility—as is fitting for adult mature beings—and at the same time let us cherish the hope, and, above all, the firm determination, that it will not be translated into fact.”¹⁵

¹⁵*Consideraciones sociológicas sobre el desarrollo económico*, Buenos Aires, Solar/Hachette, 1963, pp. 166-167.