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**RESEARCH**

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**QUALITATIVE RESEARCH: EPISTEMOLOGICAL, THEORETICAL AND METHODOLOGICAL FOUNDATIONS***Investigación cualitativa: fundamentos epistemológicos, teóricos y metodológicos*

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**ABSTRACT**

Qualitative research emerges as an emergent and novel paradigm, which has received the influence of diverse philosophical currents represented by: Edgar Morin, Paulo Freire, Edmund Husserl, Martin Heidegger and Schütz Alfred. The objective of this document was to analyze the epistemological, theoretical and methodological foundations of qualitative or interpretative research. The methodology used was documentary research. For this, a discrimination of scientific articles indexed in various electronic repositories was conducted, which provided a broad view on the subject of study, based on various authors and the own opinion of the researcher. It is concluded that qualitative research is an emergent theoretical corpus that supports its epistemological and methodological vision in the subjective and intersubjective experiences of the subjects, the practice of which is oriented towards the society constructed by man, where the versions and opinions of the different social actors interact to build their own reality in a cooperative and dynamic way.

**KEYWORD**

Qualitative research; paradigm; philosophical currents; epistemology; methodology

**RESUMEN**

La investigación cualitativa surge como un paradigma emergente y novedoso, el cual ha recibido la influencia de diversas corrientes filosóficas representadas por: Edgar Morín, Paulo Freire, Edmund Husserl, Martin Heidegger y Schütz Alfred. El objetivo del presente documento fue analizar los fundamentos epistemológicos, teóricos y metodológicos de la investigación cualitativa o interpretativa. La metodología usada fue la investigación documental. Para ello, se realizó una discriminación de artículos científicos indexados en diversos repositorios electrónicos, que brindaron una visión amplia sobre la temática de estudio, en base a diversos autores y la opinión propia del investigador. Se concluye que la investigación cualitativa es un corpus teórico emergente que sustenta su visión epistemológica y metodológica en las experiencias subjetivas e intersubjetivas de los sujetos, cuya práctica se orienta hacia la sociedad

construida por el hombre, donde interactúan las versiones y opiniones de los distintos actores sociales, para construir su propia realidad de manera cooperativa y dinámica.

#### **PALABRAS CLAVE**

Investigación cualitativa - paradigma - corrientes filosóficas - epistemología - metodología.

## **INVESTIGAÇÃO QUALITATIVA: FUNDAMENTOS EPISTEMOLÓGICOS TEÓRICOS E METODOLÓGICOS**

#### **RESUME**

A investigação qualitativa surge como um paradigma emergente e novo, no qual recebeu influência de diversas correntes filosóficas representadas por Edgar Morín, Paulo Freire, Edmund Alfred. O objetivo do presente documento foi analisar os fundamentos epistemológicos, teóricos e metodológicos da investigação qualitativa ou interpretativa. A metodologia usada foi a investigação documental. Para isso, se realizou uma discriminação de artigos científicos indexados em diversos repertórios eletrônicos, que brindaram uma visão ampla sobre a temática de estudo, em base a diversos autores e a opinião própria do investigador. Se conclui que a investigação qualitativa é um corpus teórico emergente que sustenta sua visão epistemológica e metodológica nas experiências subjetivas e intersubjetivas dos sujeitos, cuja pratica orienta-se a sociedade construída pelo homem, onde interatuam as versões e opiniões dos distintos atores sociais, para construir sua própria realidade de maneira cooperativa e dinâmica.

#### **PALAVRAS CHAVE**

Investigação qualitativa; Paradigma; Correntes filosóficas; Epistemologia; Metodologia

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### **1. INTRODUCCIÓN**

Epistemology is one of the few sciences that has allowed man to search and understand the surrounding world and the subject-object relationship from different perspectives, to generate, interpret and transmit new knowledge. Among the various epistemological currents is the Qualitative or Interpretive Paradigm. Paradigm is to be understood as those interrelationships of universally accepted scientific theories which, for a certain time, provide models of problems and solutions to a scientific community in a certain area of knowledge (Corona, 2016a).

This philosophical perspective conceived as a research methodology is a new way of seeing the world as it significantly contributes a subjective experience of the facts in their natural state, as they are perceived, establishing the way to achieve and attain knowledge (Sánchez, 2015).

The objective of this document was to analyze the crisis of paradigms and the emerging paradigm from modernity and postmodernity, emphasizing the epistemological, theoretical, methodological and axiological foundations of qualitative or interpretative research, as well as the contributions of philosophers: Edgar Morín, Paulo Freire, Edmund Husserl, Martin Heidegger and Schütz Alfred in the emergence of this paradigm.

## **2. METHODOLOGY**

The methodology used was exhaustive documentary research, which consists of reviewing bibliographic material on the object of study to perform an analysis on the selected content (Corona, 2016b). For this, a discrimination of scientific articles indexed in various electronic repositories, postgraduate theses and institutional documents was conducted, which provided a broad view on the subject of study, based on various authors and the own opinion of the researcher.

## **3. DISSCUSION**

The development of the manuscript, four key points were taken into account: epistemological and methodological foundations of qualitative research, distinctive theoretical-conceptual foundations of qualitative research (concept, characteristics and application), philosophers and precursors of qualitative research. Below, each of the aforementioned aspects is detailed:

### **3.1. Epistemological and Methodological Foundations of Qualitative Research**

From the epistemological point of view, knowledge is the interpretive and subjective theoretical construct that man (cognoscente subject) gives through initial observation and reciprocal interaction with the object of study, governed by different patterns or determined styles of thought, either, through his experience or reason. In the case of qualitative research, the obtaining of knowledge is given by a style of experiential thinking and opens the way for deep understanding of social phenomena through intuition and the consciousness of the inner self, that is, the connection between consciousness, feelings and being (Hernández and Padrón, 1997).

Idealistic ontology gives an explanation of this event, since a physical or observable object, cannot have existence in itself, but there is a being with a knowing mind that is aware of that object (Briones, 2002). Therefore, the social and spatial

construction of the reality where the individual is imbibed does not exist if his mind and thought does not "apprehend" a situation, problem or phenomenon of particular or community interest (Bunge, 2002).

Therefore, the researcher-object of study relationship is concomitant, since there is a democratic and communicative participation between the researcher and the researched subjects (Colomer, 1990). Consequently, the construction of knowledge occurs in a collaborative, harmonious and dynamic manner, with reflection, the methodological procedure used by excellence, which enables the analysis and treatment of ideas and perceptions of transcendental consciousness, either through matrices of content analysis, triangulations of researchers and methods, allowing the contrast of the opinions of the participants in the study, with the analysis of impressions recorded in instruments such as: the field diary and anecdotal record *in situ*, with the theoretical frame of reference, based on the categories of analysis that emerged during the interaction between the researcher and the audience.

Considering the interview and systematic observation to be the extraction techniques and models of knowledge production. Their logic is knowledge that allows the researcher to understand what is going on with his object of study, from the pictorial interpretation. Therefore, it does not seek the verification of knowledge, only its discovery and interpretation, starting from its version makers (González, 2007).

### **3.2. Distinctive theoretical-conceptual foundations of qualitative research**

Qualitative research; is a type of research the purpose of which is to provide greater understanding, meanings and subjective interpretation that man gives to his beliefs, motivations and cultural activities, through different research designs, either through ethnography, phenomenology, action research, life stories and grounded theory (Behar, 2008).

Among the most outstanding characteristics of qualitative research, the following can be mentioned (Vasilachis *et al.*, 2006):

1. There is no objective reality, since it is constructed socially from the key actors or informants.
2. Knowledge (episteme) emerges from people who actively participate in research.
3. The main task of the researcher is to understand and interpret the world of the participants based on their experiences and visions of the environment where they develop.
4. The researcher and the participants interact in a constant and dynamic way during all the stages of research.
5. Research is a mosaic product resulting from cultural, ethnic and researcher's values.
6. It is holistic and integrative, because it does not leave out any new information that arises during the inquiry. Therefore, the objectives of the study can change

based on the vicissitudes during the collection of information with significant subjects (Study sample).

7. Qualitative research does not start from verifiable assumptions or hypotheses, or from quantitatively measurable variables, since it analyzes subjective information that cannot be detected through the senses and induction (affection, cultural values, motivations, among others).

The aforementioned points show that qualitative research is based on naturalistic observations, based on comprehensive and behavioral models, with a constructivist and transforming perspective of social reality, qualities that are only found in this research methodology, allowing the emergence of this approach on the positivist and neo-positivist vision, leaving aside the methodological rigor of the previous ones, to promote new forms and nuances that allow researchers to delve introspectively into the distinctive anthropological ideas and practices of the human species, which produced a crisis within the quantitative paradigm, as it did not respond to those patterns not measurable by formulas or statistical and / or mathematical procedures, which are inalienable to human behavior such as affectivity, introspection, among others.

Therefore, it is considered a novel and flexible approach, which is directly influenced by the culture and particular social relationships, which make subjective reality depend on the understanding and analysis of the knowledge of the ways of perceiving, thinking, feeling and acting of the knowing subject.

### **3.3. Philosophers and precursors of qualitative research**

The qualitative research approach has been influenced by important philosophers and researchers such as: Edgar Morín, Paulo Freire, Edmund Husserl, Martin Heidegger and Schütz Alfred, who provided a profound vision of human interaction with the underlying environment and how subjects interpret their own experiences to acquire certain behaviors. In short, the most significant contributions of these precursors in the scope of the interpretative approach are described:

**Edgar Morín:** The complex vision of the critical reality of man in relation to his environment is set out by Morín (1999) in his theory of "Complex Thought", who starts from the prevailing and urgent need for the reconciliation of man with his environment, together to an improvement in human relations, that is, a methodology of new thinking, to understand nature, society, reorganize human life and to find solutions to the crises of today's humanity, the human capital being the intellectual basis of organizational success

With this, Morin expresses that, in the processes of generation and transmission of knowledge, human beings participate directly, with different mental models, knowledge, values, principles and beliefs, which strongly influence the perceptions, translations and reconstructions that he himself makes about the information received.

**Paulo Freire:** He states that education and research is not an act of transmitting knowledge, but rather it is formed through a world in common and its acquisition is continuous, because human beings are beings of transformation and not of adaptation, which implies cultivating knowledge from the reality of man (self-learning) without a rigorous method that limits the action of the subject in search of the destruction of the barriers of ignorance (García and Puigvert, 1998).

The postulate of Friere, leads to an intrinsic reflection of the inner self in accordance with the biographical methodology and action research, in search of the continuous social transformation and the emancipation of the oppressed peoples for lack of a culture of knowledge, that is, man is not made in silence, but in word, action and self-retrospection.

**Edmund Husserl:** The vision of Husserl leads to knowing part of the life of the participants in research, as well as their own world, related to the phenomenon under study, that is, their starting point is the life of the people, focusing on how the experiences, meanings, emotions and situations of the individual under study are perceived, learned and conceived (Barbera and Inciarte, 2012; Lámbert, 2006).

This new perspective provides a novel feature, as it carries us towards the doors of phenomenological design and the interpretive essence of hermeneutics, allowing us to study and interpret the need to appropriate the meaning that underlies the experiences lived by the individual in relation to their physical and biological environment, where absolute truth does not exist, since everything depends on the intrinsic subjectivity of man.

**Martin Heidegger:** This philosopher gave a interesting nuance to social phenomenology, since he founded the bases of knowledge on the experience of one's existence, what he called "El Dasein", that is, "the being there" where man is the center of his own reality and only he can create his ideas and social practices according to the daily events and the impact that those experiences have on his decision-making and vision of the world (Buitrón and Calderón, 2012; Corona *et al.*, 2016f).

Heidegger intends to explain that man is the architect of his own destiny and consequently of his actions in the world where he works. The knowing being is the epicenter of history; therefore, he builds his own reality according to his daily living and interaction with others, influencing the foundation of ethnic and cultural patterns within society.

**Schütz Alfred:** He is considered one of the most important philosophers in sociological research. He introduced Husserl's methodology to study and compare different social groups, distinguishing two terms used to date: actor and observer. In the first, he refers to the subjects belonging to a group or ethnic group and, in the

second, to the subject that inquires or investigates the actors, to understand and interpret the meanings they give to various objects (Morales, 2011). However, the actor can change his role to observer and vice versa, something similar to what happens in research with IAP (research-action-participants) designs, where there are reciprocal interactions between the significant subjects and the researcher.

Schütz complemented Husserl's ideas and, in a way, the approaches of Heidegger, since the relations among subjects occur in a diverse and dynamic sociocultural context, nothing is static in society, the occurrences of phenomena come and go and are the main reason for the divergences of cultures, religions and ideas that permeate the human species, in a heterogeneous and subjective world.

#### 4. CONCLUSION

Qualitative research is an emerging paradigm that supports its epistemological and methodological vision in the subjective and intersubjective experiences of the subjects, the practice of which is oriented towards the society constructed by man, where the versions and opinions of the thinking being interact with respect to the facts and phenomena of study, to construct reality in a cooperative and dynamic way.

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