

Historical-Critical Methodology in Educational Research: 1st approaches

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ABSTRACT – Historical-Critical Methodology in Educational Research: 1st approaches. The Historical-Critical Pedagogy (HCP), developed by Dermeval Saviani, is an important educational perspective that considers history, society, and power as determining factors, allowing the analysis of the educational field, especially those resulting from public policies. The aim of this article is to present it as a methodology for research in the field of education. This is an analytical, bibliographical essay on the works of Saviani (2021a; 2021c), which also provides theoretical and epistemological support for the investigation. In summary, Historical-Critical Pedagogy (HCP) presents assumptions that, in addition to theory, are considered necessary for the consolidation of a research methodology for analyzing the educational field, making it possible to perceive contradictions and power relations between groups in educational policies.

Keywords: Historical-Critical Pedagogy. Saviani. Methodology. Educational Policy.

RESUMO – Metodologia Histórico-Crítica em Pesquisas Educacionais: 1.ªs aproximações. A pedagogia histórico-crítica (PHC) elaborada por Dermeval Saviani é uma perspectiva educacional importante que considera história, sociedade e poder como fatores determinantes, permitindo análises do campo educativo, em especial, as que emergem das políticas públicas. O objetivo deste artigo é apresentá-la como metodologia para investigações na área educacional. Trata-se de um ensaio analítico, de corte bibliográfico, das obras de Saviani (2021a; 2021c), que fornecem também o aporte teórico-epistemológico da investigação. Em síntese, a Pedagogia Histórico-Crítica (PHC) apresenta pressupostos que além da teoria são considerados necessários na consolidação de uma metodologia de pesquisa para análise do campo educacional, permitindo perceber contradições e relações de poder entre grupos nas políticas educacionais.

Palavras-chave: Pedagogia Histórico-Crítica. Saviani. Metodologia. Políticas Educacionais.

Introduction

The field of educational research is a challenge for educational researchers. There are countless congresses, journals, research/study groups, and stricto-sensu postgraduate programs that attempt to bring methodological consistency to educational research. As Dalbosco, Dela Santa and Baroni (2018) point out, just as education has a well-defined institutional, administrative, and organizational reality, it does not have a specific epistemological existence. The problem denounced by the authors is echoed in the academic record, which points to the difficulty of finding a specific nature for educational research and the epistemological foundations related to the methodological proposal.

Educational research is considered a polysemic, fluctuating, and diverse space, since it deals with a broad object of study that draws on different approaches and different fields. In the words of Charlot (2006, p. 9), educational research ends up becoming an epistemologically weak field, “[...] poorly defined, with blurred boundaries and fluid concepts,” which absorbs a series of unscientific discourses and academic weaknesses. In this sense, the practice of “anything goes in educational research” is incorporated. In the same sense, Gatti (2012) states that educational research is characterized as a general jelly, due to the use of imprecise terms and questionable epistemological rigor. The methodological weaknesses have led to the adoption of a scientific ideal derived from the methods of the exact sciences, which, by instrumentalizing the object of research, relativizes the theoretical/epistemological foundation and weakens the claims of validity of educational knowledge. This condition brings positivism back to education, which, for Dalbosco, Dela Santa and Baroni (2018), ends up reducing educational research to a methodological-experimental procedure that limits the study of educational phenomena to what is measurable, reinforcing the positivist utopia of science.

This orientation contributes to research that limits the understanding of the complexity and dynamics of the field, ultimately imposing the empirical over the theoretical/epistemological. This configuration has led to research with little or no theoretical density and research methods that do not respond to the complexity of education, especially educational policy.

One of the pedagogical concepts that can contribute to broadening the methodological framework of educational research is Historical-Critical Pedagogy (HCP), developed by Professor Dermeval Saviani. HCP aims to overcome inequalities by understanding education as a social phenomenon embedded in a historical context. It is guided by the search for human emancipation, using the categories of Marxism that place practice at the center of the educational process, uniting theory and practice to build a revolutionary education. This pedagogical approach is fundamental for Brazilian education, which still suffers from the legacy of inequality and social exclusion.

In this sense, PHC can provide the tools for analyzing education and society, allowing us to understand the relationships between culture and education, social inequality and education, educational structure and practices, and the role of schools in society. We believe that PHC can contribute elements to the development of an essential investigative methodology for researchers in educational policies and for all education professionals who seek to develop research with methodological coherence and scientific rigor.

Against this backdrop, the research problem arises from the desire to present PHC as a necessary dialog for the educational field and essential to the methodological foundation of research in the field of educational policies. The research problem is characterized by the question: What is the contribution of PHC to educational research? The aim is to show that PHC, through its concepts, becomes a methodology for research and investigation into educational policies. The research is exploratory, bibliographical, and analytical in nature. The object of study is Saviani's (2021b; 2021c) works.

The essay's itinerary is organized into two parts. The first part deals with the formulation of historical-critical pedagogy. The intention is to present the theoretical and conceptual bases for the formulation of the methodology based on HCC. Emphasis is placed on the concepts elaborated by Marx, Vásquez and Gramsci, which underpin PHC. The second part deals with the categories of historicizing, materiality/concretizing, theory and practice, radical, rigorous, and the whole. The categories derive from the works Historical-Critical Pedagogy (Saviani, 2021c) and Education: from common sense to philosophical consciousness (Saviani, 2004).

Therefore, through the research, it is possible to understand that HPS, as a necessary dialogue, presents itself as an important condition to methodologically support research in the educational field, above all because it responds to the complexity and dynamics of education, by analyzing the facts based on the historicity and concreteness of the phenomena. The historical-critical methodology provides support for educational research that allows the researcher to escape the objectivist instrumentalism of empirical data and/or practicality, by recognizing the materiality, historicity, and intentionality of knowledge production.

The Development of a Pedagogical Concept: Historical and Theoretical Context of PHC

Dermeval Saviani was born in Santo Antônio de Posse, São Paulo, on December 25, 1943, and later registered on February 3, 1944. In 1948, his family moved to São Paulo, where he attended elementary school and later high school in seminaries. Saviani began his philosophical training in 1962 and graduated in philosophy from the Pontifical Catholic University of São Paulo (PUC-SP) in 1966. In 1967, he began teaching philosophy and education at PUC-SP and other schools. He received his Ph.D. in Philosophy of Education from PUC-

SP in 1971 and began working as a professor in postgraduate programs in Philosophy of Education. In 1986, he received the title of Lecturer in History of Education, and in 1990, he was accepted in a public competition for the position of Assistant Professor of History of Education at the State University of Campinas. In 1993, he became a full professor of History of Education at the same university. In the early 1980s, he participated in the creation of the National Education Association and the publication of the journal *Ande*. Saviani was also a member of the São Paulo State Education Council and coordinator of the Education Committee of the National Council for Scientific and Technological Development (Gama; Santos Júnior, 2014).

Saviani began teaching at the age of 22, during the time of the civil-military coup in Brazil. During his career, he witnessed the transformation of the Catholic Church's approach to development in Latin America, from a focus on development to a focus on liberation. At the Catholic University, he witnessed the spread of Marxist ideas and the creation of postgraduate programs in the philosophy of education. Since then, Saviani has dedicated himself to Brazilian education, seeking to train critical and reflective citizens capable of questioning the current social order, reflecting his commitment to the struggle of the subaltern and against military repression (Batista; Lima, 2013).

As Batista and Lima (2013) point out, Saviani's theoretical production emerged in the context of the military dictatorship in Brazil, which was characterized by repression, persecution, and the assassination of political and social leaders. The military government sought to repress and co-opt the population through strategies such as the creation of ghost unions and changes in the union structure through decrees. However, this strategy created contradictions, and the critical trade union movement began to strengthen in the 1970s with the outbreak of important strikes, such as the ABC metalworkers' strike. Military repression also failed to eliminate the opposition completely and only increased the contradiction, causing sectors of the population to join the resistance. Saviani's work was developed in the historical context of resistance to the reactionary movement established in education in Brazil.

According to Saviani (2021b), PHC emerged as a response to the need to find an alternative to the dominant pedagogy at the end of the 1970s. It took place in the context of the development of critical analyses of education and corresponded to a historical need, especially in Brazil, where it was necessary to criticize official pedagogy and highlight its reproductive character. It was not limited to the Brazilian situation, but was a global movement.

Based on his criticism of the Scholastic Movement¹, Saviani recognized the inadequacy of this pedagogical current, which, in his opinion, was not revolutionary enough and did not consider the social and political inequalities that affected education. He then began to think about and develop a pedagogical approach that took these elements into account, was more critical and dialogical, and valued the

participation of students in the search for overcoming social inequalities. He published his first article on this proposal in 1982, and in 1983 he published the book *School and Democracy*. In 1991, he published the book *Historical-Critical Pedagogy - First Approaches*, which seeks to deepen discussions about PHC.

PHC is a non-reproductive critical theory² that seeks to consider the interests of the subaltern in education and to confront reactionary thinking. Saviani found it difficult to find a suitable name for his pedagogical conception, which had a theoretical basis critical of both scholasticism and critical-reproductivist theory. According to him (Saviani, 2021c), the name came in response to a demand from students at the PUC-SP who wanted a subject that would deepen the study of revolutionary pedagogy, but this name, revolutionary pedagogy, was problematic. Therefore, it was necessary to find a more appropriate name. The author presents an important summary of his approach:

[...] What I mean by the expression historical-critical pedagogy is the commitment to understanding the educational question because of objective historical development. Therefore, the concept presupposed in this vision of historical-critical pedagogy is historical materialism, that is, the understanding of history based on material development, on the determination of the material conditions of human (Saviani, 2021c, p. 76).

The term historical-critical reflects a pedagogical theory that seeks to understand pedagogy from its place in the historical and social process. It stands in contrast to critical-reproductive theories, which did not consider the historical and social context when analyzing pedagogy. The historical-critical formulation emphasizes the importance of understanding historical movements and social transformations to understand pedagogy and its relationship with society. At the same time, it remains critical, but unlike critical-reproductive theory, it does not limit itself to a purely reproductive approach, but seeks to understand history and its dynamics to understand pedagogy.

Saviani seeks to develop a theory of education based on Brazilian reality and oriented to the interests of the working class, using historical-dialectical materialism³, a method inaugurated by Marx, as its foundation, according to the author:

The theoretical foundation of historical-critical pedagogy, in its philosophical, historical, economic, and political-social aspects, explicitly proposes to follow the paths blazed by Marx's acute investigations into the historical conditions of the production of human existence that resulted in the form of today's capitalist-dominated society. It is therefore in the spirit of his investigations that this pedagogical proposal is inspired (Saviani, 2021a, p. 422).

Historical-dialectical materialism “[...] is the philosophical science of Marxism that studies the sociological laws that characterize the life of society, its historical evolution, and the social practice of men in the development of humanity” (Triviños, 1992, p. 51). Historical-dialectical materialism represented a radical change in the under-

standing of social phenomena, which until then had been explained essentially by idealism. Regarding Marxism, Triviños (1992) points out that this approach seeks to solve social problems through social transformation, as presented by Peña in his work, *What is Marxism?* For the author:

Marxism is a general and total conception of man and the universe. Because of this conception of the world, it is a critique of the society in which Marxism was born, that is, a critique of capitalist society. As a result of this critique, and as a result of this critique of capitalist society, Marxism is a policy, it is a program of action for the transformation of society, for the creation of a new society, that is, for the creation of a new type of relationship between men (Peña, 2015, p. 18).

For Löwy (1991), there is no single way to define Marxism, he concludes that it can be called historical materialism, dialectical materialism, philosophy of praxis, all of these nomenclatures display the same object, but crossed by different angles, hence one of the great riches of this method. Karel Kosík (1969, p. 17), in his work *Dialectics of the Concrete*, presents Marxism as “[...] an effort to read, behind the pseudo-immediacy of the reified economic world, the inter-human relations that built it up and concealed themselves behind its work”.

The contribution of the Marxist method to education is presented by Frigotto (2001), who points out that, from a historical materialist perspective, the method is linked to a conception of reality, the world, and life. In this sense, the researcher's position precedes the method. The latter is characterized as a kind of mediation in the process of apprehending, revealing, and exposing the structuring, development, and transformation of social phenomena.

Masson and Mainardes (2013), in pointing out the contribution of Marx's method to the field of education, conclude that the reproduction of the concrete through thought, made possible by historical-dialectical materialism, means that it is possible to arrive at true knowledge because it explains reality as it is, in a certain historical, economic, political, social and cultural context, but it is ephemeral, provisional.

Understanding the influence that Marxism has on Saviani's work, we can conclude that he seeks to develop a theory of education that is grounded in Brazilian reality and geared towards the interests of the working class, using historical-dialectical materialism as its basis. This approach allows for a critical analysis of capitalist society and seeks social transformation as a means of solving social problems. The use of historical-dialectical materialism as the basis for Saviani's theory of education contributes to the construction of a pedagogy (which Saviani himself tended to call revolutionary) that seeks to overcome educational and social inequalities.

Some categories of Marxism are fundamental to understanding how PHC is theoretically constituted and how we can envision this

approach for methodological purposes. As pointed out by Saviani (2021c), Marx did not work in an elaborate way on pedagogical issues, hence the need to look for other intellectuals who developed Marxian thought in this direction, such as Vásquez and Gramsci, among others. Some central categories pointed out by Saviani are: dialectics, contradiction, mediation, and praxis.

In relation to dialectics, Saviani (2021c, p. 119) points out:

When we think about the theoretical foundations, we see that, on the one hand, there is the question of dialectics, this relationship of movement and transformations, and, on the other, that it is not a question of an idealistic dialectic, a dialectic between concepts, but a dialectic of real movement.

In Marxist thought, the concept of dialectics is a science connected to reality and enriched by the social practice of humanity. Through the dialectical approach to reality, dialectical materialism shows how matter is transformed and how the transition from lower to higher forms occurs (Triviños, 1992). Marx established the difference between the dialectical method he used and that developed by Hegel:

My dialectical method is not only fundamentally different from the Hegelian method, but exactly the opposite. For Hegel, the process of thought, which he even transforms into an autonomous subject under the name of the idea, is the demiurge of the actual process, which is only the external manifestation of the former. For me, on the other hand, the ideal is nothing more than the material, transposed and translated in the mind of man (Marx, 2013, p. 90).

The goal of this dialectical movement is to find a scientifically correct method. For Marx, it is not enough for dialectics to be based on reality as a guarantee of objectivity because then it loses its meaning. Concreteness is of the theoretical order, and it is theoretical work that builds the concreteness of reality, replacing empty abstraction with multiple theoretical determinations, as Marx (2011, p. 54) points out:

Concrete is concrete because it is the synthesis of multiple determinations and, therefore, the unity of diversity. For this reason, the concrete appears in thought as a process of synthesis, as a result, not as a starting point, even though it is the effective starting point and, consequently, also the starting point of intuition and representation. In the first way, full representation has been volatilized into an abstract determination; in the second, abstract determinations lead to the reproduction of the concrete through thought.

Dialectics seeks to understand reality in its entirety, capturing both its actuality and its potential. It is a method of concrete knowledge that does not reduce things to abstract and empty entities, but considers them in their complexity, with all their characteristics, and in constant movement. Through dialectics, it is possible to study and unveil the contradictions that exist in any unity and understand the unity towards which they tend. In short, dialectics allows for a deeper and more complete understanding of reality (Peña, 2015).

Contradiction is derived from dialectical movement; there is a permanent struggle between opposites that are united, which, in turn, leads to the solution of the contradiction and the change of the qualitative state. There are different types of contradictions, such as antagonistic ones in society, where the means of production are privately owned, and non-antagonistic ones in society, where the means of production are socially owned. Contradictions can be internal or external, basic or secondary, and are recognized as a universal form of being (Triviños, 1992). According to Lenin (1979, p. 20), dialectics deals with what we call the theory of knowledge, which “[...] must also consider its object from a historical perspective, studying and generalizing the origin and development of knowledge, the passage from ignorance to knowledge”.

In this sense, the dialectic expressed in historical materialism is fundamental to PHC, which seeks an education geared towards the interests of the working class. Based on this understanding, PHC seeks to understand education as a social phenomenon that is inserted in a specific historical context and that has dialectical relations with other elements of society, such as the economy, politics, and culture. In this way, by applying dialectical materialism to education, it is possible to understand it as a reflection of the social relations in which it is inserted, as an institution that reproduces and reinforces the inequalities and contradictions present in society, but which also allows for the possibility of overcoming this condition.

The category of mediation is based on Hegel's philosophy, later incorporated by Marx, and is essentially dialectical, understood as a process based on the concepts of movement and negation. It cannot be considered a product, but rather a process organized by the reciprocal negation between the elements of the relationship. Mediation is essential to the process of knowledge, as it allows reciprocal reflection to take place between the elements in a relationship, enabling the contradiction to be overcome and a new understanding to be synthesized (Almeida; Oliveira; Arnoni, 2007).

Saviani (2021b) proposes a pedagogy that includes the category of mediation, which is considered a global social practice that manifests itself in three moments: *Problematization*, *Instrumentation* and *Catharsis*. This corresponds to the process of knowledge that occurs through the mediation of analysis, moving from the empirical to the concrete through the mediation of the abstract. Practice is both the starting point and the end point of education in this approach.

From this stems the concept of praxis, which in Marx's thinking deals with:

[...] inseparable unity between theory and practice. Marxism does not believe that they are distinct and complementary. Marxism denies that theory is complementary to practice, or vice versa. For Marxism, theory and practice are nothing more than moments of the same process, which is praxis, that is, human action (Peña, 2015, p. 63).

Praxis is understood in Saviani's thinking from the perspective of Adolfo Sánchez Vázquez⁴ (2007) as the synthesis between theory and practice. While idealism establishes the primacy of theory over practice and pragmatism establishes the primacy of practice, the philosophy of praxis, like Marxism, seeks to unify theory and practice in praxis. Practice is the originator, having primacy over theory, and theory is derived, being illuminated by practice (Saviani, 2021c).

In Vázquez's (2007) conception, praxis is comprehensive and is not restricted to a specific sector; it includes art, theoretical creativity, the revolutionary transformation of society, organization, and class struggle, which are considered examples of creative praxis, as they represent the union between subjectivity and objectivity, thought and reality, reflection and action in relation to historical processes, which are unique and unrepeatable.

The Italian intellectual Antonio Gramsci⁵ approaches praxis as philosophy. For the author, the philosophy of praxis is the theory that is committed to articulating theory and practice and unifying them in praxis. It is a primarily practical movement, but one that is theoretically based, feeding on theory to clarify the meaning and give direction to practice. The philosophy of praxis plays a fundamental role in the process of political struggle, as it demands clarity about philosophical, legal, religious, and moral problems and makes it necessary to fight for political hegemony in the fields of ethics and politics, until a higher elaboration of one's own conception of reality is reached. The awareness of being part of a certain hegemonic force, political consciousness, is the first phase of a further and more progressive self-consciousness, in which theory and practice are finally unified (Baptista, 2010).

The concept of praxis is therefore fundamental to PHC, as it provides an understanding of education as a transformative social practice. Praxis is understood as an action guided by critical reflection and an understanding of social reality, implying critical reflection on social reality and the search for alternatives to overcome social and educational inequalities.

From the educational perspective, of PHC, it is possible to understand education as a social phenomenon that is inserted in a specific historical context and that has dialectical relations with other elements of society. In this sense, PHC seeks to understand education as a fundamental social practice that seeks to overcome educational and social inequalities, and is therefore a revolutionary pedagogical approach aimed at human emancipation. Using the categories of Marxism, Saviani developed a critical pedagogy that places praxis at the center of the educational process, unifying theory and practice to build a truly transformative education.

Historical-Critical Pedagogy as a Methodology for Educational Policy Research

Research in the field of education, and more specifically, research on educational policy, must not lose sight of its commitment to a thorough analysis of the research problem based on methodological consistency. In the field of educational policy, Shiroma, Campos, and Garcia (2005), in their provocative and illuminating article entitled *Deciphering texts to understand policies: Theoretical-methodological subsidies for the analysis of documents*⁶, point to the need for educational researchers, in signaling their epistemological and methodological contributions, to be able to analyze educational policies and their documents through two movements, namely, what they explicitly say, but also to perceive and capture what they don't say, that is, the subjective, ideological, and discursive intentionalities that escape appearance but influence the organizational structure of education.

In this context, HCI is a methodological foundation for the study of education. Historical-critical methodology, according to Saviani (2021b), is consolidated as a condition for overcoming critical-productivity theories. According to Corsetti (2010), in analyzing these theories, Saviani, while recognizing the power of criticism of the educational apparatus, did so in a way that eliminated departures from the pedagogical field. One of the main problems was the fact that these theories did not offer an alternative because they did not provide a pedagogical perspective for educational practice.

[...] the problem with critical-reproductive theories was their lack of historical roots, that is, their lack of understanding of the historical movement that develops dialectically in its contradictions. It was a matter of taking this movement into account and seeing how pedagogy fits into the processes of society and its transformations. Thus, the term historical-critical was, in a way, opposed to critical-reproductive. It is critical as it is, but unlike it, it is not reproductive, but rooted in history (Saviani, 2021c, p. 119).

These notes set the tone and design of historical-critical methodology by introducing the concepts of dialectic, contradiction, materiality, and historicity. For Corsetti (2010, p. 89), “[...] this is a historical dialectic expressed in historical materialism,” which is the concept that seeks to understand and explain processes through the way social relations and their conditions of existence are produced. This condition, according to Corsetti (2010), makes it possible to understand issues related to educational policy from the perspective of objective historical development. This means understanding education, and more specifically, educational policy, in the context of the materiality of social relations.

Thus, Saviani (2017), in an interview for the journal *Interface: Communication, Health, and Education*, presents three clarifying points for the development of a truly critical theory of education. In

the sense of the objective of the text, the three points presented lead to the guiding methodological procedures for research in educational policies, which should be taken as points of organization, summarized in Chart 1.

Chart 1 – Movements of the historical-critical methodology

Movement	Description of movement
1	Approaching the object in its structural characteristics to understand it in its concreteness.
2	Contextualization and critical analysis of the treatment given to the object of investigation by hegemonic theories to perceive their contradictions.
3	Elaboration and systematization of analytical categories based on the PHC and inference of conclusions and analysis of the phenomenon studied.

Source: Adapted from Saviani (2017).

The movements define for the researcher the obligation of epistemological vigilance, which allows the researcher to assume three basic conditions for the analysis of the educational phenomenon, namely concreteness, contextualization of theories, systematization of analytical categories based on PHC and drawing conclusions to understand the totality of the research object. As Saviani (2017) warns, these movements should not be taken formally or chronologically in a mechanical sequence. They are movements that interconnect, transversally, and intersect in a constant movement of reciprocity.

For Saviani (2017), the first movement is related to the problem that motivates a particular investigation. According to Saviani (2017, p. 716), “problematizing can manifest itself in different circumstances and in different ways.” Thus, an investigative problem arises from everyday practice, from contact with theories, from dissatisfaction with the guidelines emanating from official policies and directives, from philosophical, ideological, political, aesthetic, and moral choices, and so on. Problematizing is the initial condition for research with historical-critical methodology because it leads to an understanding of concreteness⁷.

The second movement recognizes that no theory/epistemology is neutral. Theories/epistemologies are surrounded by intentionality and interests that guide scientific knowledge. To this end, one of the basic assumptions of historical-critical methodology is to be aware of the theoretical/epistemological choices that the researcher makes for his or her analysis and, secondly, to realize that there is no scientific neutrality.

In this sense, hegemonic theories correspond to dominant ideas that correspond to the ideas of the dominant class. According to Saviani (2017, p. 718), “[...] these are the hegemonic theories that give universal expression to the interests of the dominant class, presenting them as corresponding to the interests of society as a whole”. Therefore, the historical-critical methodology must verify the limits, short-

comings, and inconsistencies of hegemonic theories. In this sense, it is essential to epistemologically dismantle hegemonic theories. This condition is essential for any educational policy research - the ability to verify and analyze hegemonic theories to eliminate theoretical and methodological errors and mistakes.

The third movement includes two aspects: a) systematization of categories, and b) drawing conclusions and analyses of the phenomenon under study.

In systematizing the categories, the researcher approaches the catharsis^b proposed by Saviani (2021a, p. 62), which deals with the “elaboration-transformation of structure into superstructure in the consciousness of people”. Catharsis emphasizes the subjectivized objectivity that researchers achieve through their research work. In the process, they achieve a more profound understanding of the objects of study and master the cultural tools necessary to bring about transformations in material life with ethical-political intentions. Catharsis, therefore, is not only the immediate application of learned concepts but also a broad and integrated understanding of reality and its possibilities for transformation (Faria, 2022).

The drawing of conclusions and the analysis of the phenomenon studied allow the reconstruction of a new society, a new subject, and a new culture. In the words of Saviani (2017, p. 719), “[...] it is necessary to expose, systematically, the result of the investigation that has penetrated into the pedagogical processes and reconstructed their objective characteristics,” which allows the formulation of pedagogical guidelines and answers to the research problem. As Saviani points out, social practice is the starting and ending point of the process. With the acquisition of theoretical-practical tools, the researcher's practice is qualitatively transformed, allowing him to position himself critically and creatively, having a reflected, mediated, essential, and concrete view of phenomena. This superior understanding of social practice allows the researcher to adopt a creative and dynamic attitude towards objective reality (Faria, 2022).

The three movements are the basis for the organization of an authentic historical-critical methodology that allows the researcher to define the problem and, in its investigation, to go to the root with rigor and overview.

Having defined the first stage, we will move on to organizing the analytical categories necessary for historical-critical methodology. The categories should not be taken as an absolute set. In the context of PCH, other categories and concepts of methodology may emerge that have not been presented in this text. It should also be noted that historical-critical methodology can serve as a basis for documentary research, field research, interviews, focus groups, content analysis, discourse analysis, etc. The chart below presents the defining categories of historical-critical methodology.

Chart 2 – Investigative categories of the historical-critical methodology

Category	Description
Historicize	For Saviani (2021c, p. 6), “[...] the historicizing perspective adopted here constitutes a methodological requirement inherent in the historical-critical conception. To this end, educational research must take as its reference, as the raw material of its activity, objective knowledge produced historically.
Materiality/concreteness	Materiality/concreteness consists in analyzing the phenomenon under study from its essence and its social relations. For Saviani (2004), materiality/concreteness means understanding the phenomenon under study at the heart of its dialectical and historical movement. In other words, the category of materiality/concreteness allows the synthesis of social relations materially consolidated in contradictions, disputes, social classes, and productive labor relations. This condition helps educational policy researchers to perceive the material contradictions inherent in research. In short, the category makes it possible to explain how, why, where, with what meaning, for whom, for what, who participates, what the movement is, how social classes are articulated in the process of approving the educational structure, and, more specifically, in the approval and implementation of educational policies.
Theory and Practice	Saviani (2021) points to the category of theory and practice as central to PHC and essential to historical-critical methodology. In Saviani's words (2021c, p. 120), “practice, to develop and produce its consequences, needs theory and must be illuminated by it. In this sense, the historical-critical methodology presupposes two movements for the researcher. In the first movement, care must be taken to avoid theoretical fashions and to analyze the problem as an epistemological commitment. In the second movement, as a method, epistemological vigilance is used to escape the traps of practice and common sense.
Radical	This category, adapted from the book (Education: from common sense to philosophical consciousness) (Saviani, 2004), represents one of the fundamental concerns that every researcher should take as a compass. According to Saviani (2004), it is necessary to go to the roots of the problem, to its foundations. The researcher must maintain a constant reflection that promotes a deep understanding of the problem. In other words, dealing with the problem in a radical way means going to its historical and material roots.
Rigorous	This category stems from the category of radicalism. The rigorous treatment of research, according to determined methods, questions the conclusions and knowledge of popular wisdom and the hasty generalizations that science can give rise to.
As a whole/context	This category stems from the philosophical thinking of Saviani (2004) and points to the condition that all research cannot be examined partially but from an overall perspective. The philosophical aspect of PHC for research can be systematized in the words of Saviani (2004, p. 17): “[...] while science isolates its aspect of context and analyzes it separately, philosophy, although sometimes dealing with only a part of reality, inserts itself into the context and examines it as a whole”. This category, as a methodological presupposition, requires the researcher in educational policy research to analyze the phenomenon under study in its context and its set of materially constituted relationships in society. As such, they require a thorough examination of the productive, labor, political, ideological, class, etc. aspects.

Source: Prepared by the authors.

The categories dealt with in the author's works are a necessary and fundamental synthesis for the methodological organization of research in the field of education. Historicization as a category is even defended by researchers as a concept that should appear in at least one of the objectives proposed for research on educational policies. For Saviani (2021c), when referring to the problematic discussion between Guimar and Nozella, both of whom were his doctoral students, about the relationship between political commitment and technical competence, he explains the importance of historicization more assertively and clearly. Saviani (2021c) notes that both articles are inadequate in their analysis because they fail to historicize the object of study. At this point, the fundamental question of historicization arises, which for Saviani (2021c, p. 38, emphasis added) “[...] implies a competence to refer to the different conceptions of culture. Basically, it is a matter of distinguishing between encyclopedic-didactic culture and historical-proletarian culture. Each has its idea of competence.

Historicization combined with the other categories, allows us to understand culture and its manifestations. The meaning of culture carries totality and concentricity in its material manifestations, which are the basis for dialectically deciphering the contradictions and class struggles contained in the research problem. This is what Saviani (2017) warns is the antidote to the problem of scientific-cultural neutrality, widely defended by positivists. Research based on the idea of scientific neutrality, which removes the historicization of concepts, tends to produce, in Saviani's (2017) words, interpretations, and analyses of abstract, a historical data that are disconnected from social praxis. According to Saviani (2021c, p. 51),

[...] historicization. In fact, I understand that the positivist bias that associates objectivity with neutrality and denies the universality of knowledge is linked to the process of dehistoricization that characterizes this conception. Historicization, then, instead of denying the objectivity and universality of knowledge, is the way to recover them.

In this sense, the research of educational policies with the historical-critical methodology must begin, as a priority, with the category of historicization. It is necessary to consolidate a historical and historicizing base capable of understanding and comprehending the materiality, context, and concreteness of the research problem. Inattention to this category can lead to the risk of producing fragile research, incapable of proposing diagnoses and innovations that reflect the whole.

The commitment to ground the historical-critical methodology to understand the educational problem based on objective, material, and contextual development is an essential condition linked to the category of materiality/concreteness. It begins with an accurate and comprehensive understanding of the material and concrete conditions surrounding the object of study. Reliable diagnosis and conclusions derive from this imperative condition of analyzing the concreteness/materiality of the phenomenon under study. Related to this condition, Saviani (2017) states that the category of concrete totality al-

lows research to break out of its (abstract and ahistorical) shell and rescue the historical roots of the problem being studied.

In relation to theory and practice, Saviani (2017) emphatically states that educators stubbornly tend to understand them as separate poles. This understanding highlights the common sense that is propagated in educational circles, so that the discourse that claims practice against theory has become one of the dominant arguments for the reformulation of educational policies with the insertion of the pedagogy of competences. The meaning of theory and practice is elaborated by Saviani (2017), based on the studies of Vásquez, who understands that theory is practice to the extent that it materializes, through a series of mediations, what previously existed only ideally, as knowledge of reality or anticipation of the idea of its transformation.

The concept of mediation links theory and practice. Research must presuppose social practice as a transformative action. However, observing the mediating condition between theory and practice implies: a) overcoming or eliminating theoretical fashions; b) overcoming the reductionism of practice in research; c) the effectiveness of research that produces transformative knowledge; d) the condition that research, especially on educational policies, has a political commitment. The relationship between theory and practice is revealed in the analysis of concrete totality and in the political commitment that research assumes is a prerequisite for social transformation.

As Saviani (2004) warns us, the categories of radicalism, rigor, and ensemble should not be taken as self-sufficient categories that are juxtaposed in a sum. The categories are dialectically related as a connection that sustains the methodological movement. This process, described by Saviani (2004) with the concept of criticality, guarantees radicality, universality, and unity at the same time. Observing the three categories in research guarantees the researcher, through dialectical movement, an understanding of the totality of the problem under study.

The categories indicate two movements. One movement is the effort to contribute, together with the academic community, to the strengthening and maturing of a research methodology based on PHC. The second movement, which became the driving challenge of the article, was to present some categories of analysis as a research methodology for educational policy.

Conclusion

Dermeval Saviani is an essential intellectual, especially when it comes to social, political, and pedagogical thought. He is an author committed to social transformation and the struggle for a just and egalitarian society. His life trajectory and works are examples of persistence and academic rigor, offering a new political-pedagogical perspective for the country.

Developed by Saviani, PHC understands education as a social phenomenon embedded in a historical context, which seeks to over-

come social and educational inequalities. This revolutionary pedagogical approach seeks human emancipation through the use of Marxist categories, which place praxis at the center of the educational process, uniting theory and practice to build a transformative education. Similarly, one of the great challenges in the educational field is to consolidate methodologies that are capable of escaping the reductionist discourse of positive science. Within this framework, a methodology based on PHC supports a shift from a theory that has been recognized in the educational field as a pedagogical proposal, to the foundation of an investigative praxis. In this sense, the path unfolds from a theory to a research methodology that aims, with scientific rigor, to become a critical methodological practice, capable of understanding the contradictions inherent in the disputes in the public policy arena.

We seek to present PHC as a methodology that allows us to understand educational issues in the context of the materiality of social relations, through dialectics, contradiction, materiality, and historicity, with a special focus on research into educational policies, contributing methodological consistency and the possibility of analyzing not only what is explicitly said, but also the intentions underlying political documents.

In this sense, the historical-critical methodology for research in education requires three interconnected movements: 1) identifying the problem that motivates the research; 2) raising awareness of the theories/epistemologies that influence the research; and 3) systematizing the categories for analyzing the phenomenon studied and inferring results. The methodology requires an understanding of the concrete nature of the educational problem, a critical analysis of hegemonic theories, and the formulation of pedagogical guidelines based on the results of the research. These movements are interconnected and cross-cut each other in a constant movement of reciprocity. The historical-critical methodology seeks to epistemologically dismantle hegemonic theories and reconstruct a new society, a new subject, and a new culture.

We highlight the importance of historicization as a fundamental category for the methodological organization of research in the educational field, allowing us to understand culture and its manifestations, as well as the materiality and concreteness of the object of investigation. The categories of concrete totality, radicality, rigorosity and ensemble, when related dialectically, make it possible to understand the totality of the problem being investigated. The relationship between theory and practice is mediated by social praxis as transformative action and political commitment. Research into educational policies must presuppose a commitment to social transformation and the critical analysis of hegemonic theories, which present the interests of the dominant class as universal.

In addition to educational policy research, historical-critical methodology provides tools for the analysis of education and society,

enabling an understanding of the relationships between culture and education, social inequality and education, educational structure and practices, and the role of schools in society.

The historical-critical methodology can help analyze the relationship between culture and education, highlighting the importance of critiquing social inequalities and seeking alternatives to overcome them. In addition, it is possible to apply the approach to understand educational structure and practices, analyze the social relations involved, and seek transformative solutions for educational and social reality. The methodology can also be used to understand the role of schools in the reproduction of social relations and the formation of subjectivities, enabling a critical analysis of educational practices.

We point to a new way of understanding Saviani's work that emphasizes the work of scientific production through the appropriation of the revolutionary conception of the world proposed by PHC. To achieve social transformation, it is not enough to adopt a revolutionary pedagogy; it is necessary that the production of knowledge be based on the same principles as this pedagogy, and not only on technical-scientific content, but also on a transformative social practice that seeks to overcome inequalities and form a new human sociability.

Finally, the greatness and originality of Saviani's work allows us to take up the challenge of consolidating a methodology for studying educational policies through PHC. In accordance with the problem and the objective of the article, we set out a path for research in education based on the methodological assumptions of PHC. It should be noted that other texts and studies are under construction. The intention is to validate, together with the scientific community, the historical-critical methodology; to this end, we participate in events and present the proposal in order to collect suggestions that can qualify the process.

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Notes

- ¹ The Scholasticism movement emerged in Brazil in the 1920s and aimed to modernize education, seeking a more scientific and student-centered approach. The Manifesto of the Pioneers of New Education, drawn up in 1932, advocated the creation of a free, mixed, secular and compulsory public school, which would guarantee a common education and equal social opportunities, inspired by the ideas of John Dewey. However, the movement was criticized for disregarding cultural and moral aspects of human formation and for having ideas that were considered elitist and distant from the reality of the majority of the population. For more information: INEP (1944) and Saviani (2021c).
- ² Saviani classifies educational theories into two groups: non-critical and critical-reproductive. The first group comprises Traditional, New and Technicist Pedagogy, which sees education as an instrument for social equalization, i.e. to overcome marginalization. The second group is made up of critical-reproductivist theories, which see education as an instrument of social discrimination and marginalization. Saviani considers this second group to be critical, as it seeks to understand educa-

tion from its objective conditioning factors, i.e. the socio-economic structure that determines how education manifests itself. This critical analysis of education is important for building a pedagogy that seeks to overcome educational and social inequalities, but it is not enough. This is why a new critical, non-reproductive theory is needed, along the lines of PHC (Saviani, 2021b).

- ³ Karl Marx revolutionized philosophical thought by founding Marxism, which can be divided into four moments: the first with the works of Marx, the second with the contributions of Marx and Engels, the third with the contribution of Lenin and the fourth, the contemporary moment, with various tendencies. Marxism is made up of dialectical materialism, historical materialism and political economy and is included as a tendency within philosophical materialism. Marx's thinking is based on the Hegelian dialectical vision with a materialist worldview, and its direct sources are linked to classical German idealism, utopian socialism and English political economy (Triviños, 1992).
- ⁴ Adolfo Sánchez Vázquez was an important Spanish philosopher and writer who went into exile in Mexico after the Spanish Civil War and became an important thinker in Latin American Marxist philosophy. He wrote several works on Marxist theory and practice, as well as philosophy in general, and defended a critical view of Marxism, seeking to overcome some of the theoretical and practical limitations of orthodox Marxism. Vázquez emphasized the importance of Marx's theory of praxis and the need for a revolutionary ethic to guide the actions of militants. His work had a great influence in Latin America, especially in Mexico and Argentina, where he taught at the University of Buenos Aires (Ferreira, 2019).
- ⁵ Antonio Gramsci (1891-1937) was an Italian Marxist theorist and politician, founder of the Italian Communist Party. His contribution to Marxist theory stands out for his analysis of culture and political hegemony in the class struggle. Gramsci was arrested by Mussolini's fascist regime in 1926 and spent much of his adult life in prison. His ideas on culture and class struggle continue to be the subject of study and debate today. To find out more, we recommend reading Antonio Gramsci: Life and Work of a Revolutionary Communist (Maestri, 2020).
- ⁶ In the article, Shiroma, Campos and Garcia (2005) present in detail the methodology of discourse analysis as a condition for research into educational policies, especially for investigations involving educational policy texts.
- ⁷ For Saviani (2004), "[...] capturing true concreteness is nothing other than capturing essence". Essence is understood in the process of investigation as a product of the way in which society (subject) produces its own existence. In historical-critical methodology, the essence of the problem is necessity. Identifying the need removes what Saviani (2004) calls pseudo-concreteness. In order to avoid methodological errors in research, he points out three conditions, namely radical, rigorous and overall for defining the investigative problem. For a better understanding and in-depth study, we suggest reading the chapter Philosophy in educator training in the book Education: from common sense to philosophical awareness (2004).
- ⁸ A concept derived from the work of Antonio Gramsci.

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