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RESEARCH IN EDUCATION: METHODOLOGICAL FOUNDATIONS, DATA COLLECTION STRATEGIES AND CATEGORIZATION PROCESS IN QUALITATIVE ANALYSIS

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INVESTIGACIÓN EN EDUCACIÓN: FUNDAMENTOS METODOLÓGICOS, ESTRATEGIAS DE RECOPILACIÓN DE DATOS Y PROCESO DE CATEGORIZACIÓN EN ANÁLISIS CUALITATIVO

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ABSTRACT

Research in Education, as a domain of the Social Sciences, is characterized by investigating the scientific methods and instruments themselves. The ability to reflect on the fundamental role of research techniques and tools is necessary for the researcher to better understand the real, that is, the paradigmatic plurality and diversity of methodological strategies are mobilized here to understand complex educational phenomena. This article aims to systematize epistemological and methodological foundations of qualitative research in Education, articulating them with data collection procedures, ethical principles and content categorization and analysis processes. It is argued that the methodological choice should be guided by the formulated scientific problem and not by the exclusive adherence to a specific tradition. Starting from a critical reflection on research practices in the school context, techniques such as semi-directive interviews, observation, documentary analysis and content analysis are discussed, as well as the process of constructing analytical categories. The article emphasizes the centrality of methodological triangulation, investigator reflexivity and inferential rigor, contributing to the strengthening of educational research as a scientific field. We seek here to make methodological metareflection, in an epistemic logic of metascience, that is, when science studies its own scientific methods and instruments.

Keywords: Research in Education. Qualitative Methodology. Content Analysis. Categorization. Ethics in Research.

RESUMO

A Pesquisa em Educação, como domínio das Ciências Sociais, é caracterizada pela investigação dos próprios métodos e instrumentos científicos. A capacidade de refletir sobre o papel fundamental das técnicas e ferramentas de pesquisa é necessária para que o pesquisador compreenda melhor o real, ou seja, a pluralidade paradigmática e a diversidade de estratégias metodológicas são mobilizadas aqui para compreender fenômenos educacionais complexos. Este artigo objetiva sistematizar fundações epistemológicas e metodológicas da pesquisa qualitativa em Educação, articulando-as com procedimentos de coleta de dados, princípios éticos e processos de categorização e análise de conteúdo.

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Argumenta-se que a escolha metodológica deve ser guiada pelo problema científico formulado e não pela adesão exclusiva a uma tradição específica. A partir de uma reflexão crítica sobre práticas de pesquisa no contexto escolar, discutem-se técnicas como entrevistas semidiretivas, observação, análise documental e análise de conteúdo, bem como o processo de construção de categorias analíticas. O artigo enfatiza a centralidade da triangulação metodológica, reflexividade do investigador e rigor inferencial, contribuindo para o fortalecimento da pesquisa educacional como campo científico. Procuramos aqui fazer uma metarreflexão metodológica, em uma lógica epistêmica de metaciência, ou seja, quando a ciência estuda seus próprios métodos e instrumentos científicos.

Palavras-chave: Pesquisa em Educação. Metodologia Qualitativa. Análise de Conteúdo. Categorização. Ética em Pesquisa.

RESUMEN
La Investigación en Educación, como dominio de las Ciencias Sociales, se caracteriza por investigar los propios métodos e instrumentos científicos. La capacidad de reflexionar sobre el papel fundamental de las técnicas e instrumentos de investigación es necesaria para que el investigador comprenda mejor lo real, es decir, la pluralidad paradigmática y la diversidad de estrategias metodológicas se movilizan aquí para comprender fenómenos educativos complejos. Este artículo tiene como objetivo sistematizar fundamentos epistemológicos y metodológicos de la investigación cualitativa en Educación, articulándolos con procedimientos de recopilación de datos, principios éticos y procesos de categorización y análisis de contenido. Se argumenta que la elección metodológica debe guiarse por el problema científico formulado y no por la adhesión exclusiva a una tradición específica. A partir de una reflexión crítica sobre las prácticas de investigación en el contexto escolar, se discuten técnicas como entrevistas semiestructuradas, observación, análisis documental y análisis de contenido, así como el proceso de construcción de categorías analíticas. El artículo enfatiza la centralidad de la triangulación metodológica, la reflexividad del investigador y el rigor inferencial, contribuyendo al fortalecimiento de la investigación educativa como campo científico. Buscamos aquí hacer una metarreflexión metodológica, en una lógica epistémica de metaciencia, es decir, cuando la ciencia estudia sus propios métodos e instrumentos científicos.

Palabras clave: Investigación en Educación. Metodología Cualitativa. Análisis de Contenido. Categorización. Ética en Investigación.

1 INTRODUCTION

Research in the social sciences requires the researcher's ability to reflect and understand the assumptions inherent in knowledge and truth. Its great support, of research, is the method. The method is a conscious choice that does not evade another type of analysis that is often forgotten by research: the epistemic foundations. Thus, this work is an epistemological discussion about the world of ontology and the access we have to that world. Without steps and rules it is not possible to take this route. Hence the fundamental role of research techniques and tools.

The techniques and instruments used in this work approximate qualitative views and quantitative conceptions. Nothing prevents us, in ethnography, from using interviews, including formal interviews, questionnaires, field notes, content analysis, production or use of audio systems, video or photographic records, non-participant observation, as exemplified by Woods (1998, pp. 52–59; 91–95; 129–134; Sabirón Sierra, F., 2006, p. 336) and participant observation, as well as the use of quantitative techniques (Silva, P., 2001, p. 29). It all depends on what is for us central, or *accessory.*

2 EPISTEMOLOGICAL FOUNDATIONS OF EDUCATION RESEARCH

Research work is a work in which the researcher builds himself, that is, it is the search for thought that thinks himself. Such thinking focuses on the social world of which the researcher is a product and producer. This means that the interpretation of the world implies that the same world interprets the investigator. Hermeneutic work implies the vision of pre-understanding meanings where “my relationships with others are not limited to the known and contemporary. I also relate to predecessors and successors, those who have preceded and followed me in the global history of my society' (Berger, P. & Luckman, T., 1976, p. 45).

Thus, understanding is interpreting purposes that reflect values, beliefs and motivations. Hence “all interpretation [is] guided by the interpreter's “pre-understanding”” (Palmer, R., 1989, p. 59). It is the recognition of meanings that give meaning to the understanding itself that is necessarily contextualized and it is here that we can speak of a hermeneutic spiral that requires pre-understanding. The investigation does not evade this allocation. It is by his will that we rationalize not only what is displayed, but what is hidden. “(…) a determined will to understand gives rise to a hidden rationality of irrational behaviour which is, however, intrinsic, that is to say, which belongs, like rational action, to the life of consciousness” (Ladrière, J., 1984, p. 181).

To speak of science is to speak of contradictory movements that either unite or diversify knowledge itself.

The traditional view *mathematizes* and sustains a whole explanatory paradigm of human wisdom. “Since all the sciences are nothing but human wisdom, which always remains one and the same, however different the objects to which it applies, and receives no more distinctions from them than the sunshine of the variety of things it illuminates, there is no need to impose any limits on spirits” (Descartes, R., 1989, Rule I – p. 12). Contrary to the Cartesian view, I do not think there is a fundamental science. There are fundamental scientific points of view that lead back to the necessary and complementary interaction that build an explanatory and comprehensive scenario of the real. The variety of points of view shows that any and all reflective discourse is tainted from the outset precisely because it is *a point of view.*

The scientific project, because it is human, presupposes a uniqueness over the totality that is necessarily characterized by difference, divergence, dissemination and fragmentation. Hence it is constructed both by abstract and logical/mathematical thought and by creative inquiry, or by reflective consciousness. It begins with the problem, the doubt and the question. That is why “the average man, as a rule, does not care about what is “real” to him and what he “knows”, unless he stumbles upon some problem. (…) the philosopher is led to decide where quotation marks are appropriate and where they can be safely omitted” (Berger, P. & Luckman, T., 1976, p. 14).

I do not agree at all with the idea of the physical trunk that inspires all science, but this privilege dates back to the seventeenth century where science is confused with technique and becomes technology capable of manipulating and controlling reality. It was in the nineteenth century that the specialization of the sciences occurred and if other worlds entered and gained the status of science, these same territories were isolated from the very man who produces science. The sciences of education have not been and are not immune to this phenomenon.

> “(…) the Educational Sciences, when subordinated to the practical determinants, abandoned their comprehensive attitude to fall into an uncontrolled instrumentality and, when they tried to affirm their comprehensive attitude, irretrievably isolated me from the social spaces where educational practices are built and affirmed their superiority around a formalism in object, whose production did not exceed the barriers of banality” (Correia, 1998, p. 20).

The contrast between the natural sciences and the human sciences corresponds to the classic dualism between matter and spirit, between *empeiria* and *sophia.* Now the sciences, like man, are dual in their oneness, that is, both the explanatory and the comprehensive process, far from being irreducible, are complementary. The idea that the natural sciences are nomothetical and aim at the establishment of general laws, and the descriptive and interpretive human sciences digs a gap where this very idea falls. Freud's distinction between explanation and understanding makes less sense.

> "Unlike explanation, which is a legitimate process, even in the sciences of the spirit, understanding avoids "chemically" decomposing the data of experience in order to construct them later from a number of intellectual hypotheses, because it considers the lived as a "primitive and fundamental data" that must be deepened and embraced in its integrity, without intervening artificial divisions. (…) It is therefore a rational and discursive process that obeys the vulgar laws of logic, but is not purely rational as reasoning, because it is also based on the sympathy indispensable to the intelligence of the singular" (Freud, 1977, p.

The difficulty of systematization focuses precisely on the fact that we are dealing with and about people, with unique, singular human beings and with irreplaceable experiences. And if life is not put into formulas, even less so is the human being. "Life is not a problem that can be solved by dividing light by darkness or days by night, but an unpredictable journey between places that do not exist" (Dagerman, 2000, p. 17).

3 THE QUESTION IN SCIENCE

The question precedes science, which is characterized by the production of answers. In this sense, education can be understood as a process in which the question maintains the conceptual function: the clarification of reality. In this way, the curriculum is configured as a possible world in which there is not only a definitive answer, but rather a network of questions where answers can emerge. These answers can appeal to both explanation and understanding. The explanation demonstrates, from empirical data, the logical – and therefore abstract – process and frames them in formal or material models or structures that integrate them in the logical-empirical sphere.

In this perspective, often associated with a deterministic view of knowledge, understanding tends to be interpreted as synonymous with confusion. Its subjective and spontaneous dimension seems to run the risk of leading to error. However, it can be argued

that it is better to err in numbers and objects than to fail in a plastic sensitivity of signification projected onto concrete.

It is therefore necessary to look for what underlies the values. The question then shifts to the precedence of the forces behind the valorizing process. In other words, for whom is value a value? Under what circumstances was it created? The arbitrariness and historicity of a value does not mean its invalidity; rather, it means the need to place it in its context. And all contexts are ultimately evaluative situations crossed by power relations.

In this context, the observation recorded in *Papalagui* takes on particular significance:"When you ask an educated man a question, he immediately throws the answer in your face before you have time to shut your mouth. (…)" (Scheurmann, E. (org.), 1998, p. 68).

The question remains open because reflection must advance on what knowledge is and how education is both a product and a producer of knowledge. The question is the extension of the creative hand and the extension of the critical vision, in which everything can become a medium, a tool, an instrument, a hammer. It is this attitude that is opposed to the vision of "one mouth that speaks and very many ears, with a smaller number of hands that write; this is the academic apparatus, external, this is the university cultural machine, put into operation (…)" (Nietzsche, 1979, pp. 120-121).

Thus, the question settles into a necessary ignorance, which consists precisely in the establishment of negative answers. It is a question of understanding the perplexity before the nativity of the questions. It is not only the solution of problems through experience that is sought, but rather the union of experience and theory. The finding of the parties — the disciplines — which make up the whole — the curriculum — requires the question. This involves continually reformulating the question itself, for reformulating it already means modifying the representations.

> "The question of methods begins with the design of the qualitative research project. This always begins with a seemingly located researcher who moves from a research question to a paradigm or perspective, to the empirical world. So located, the researcher then addresses the range of methods that can be used in any study." (Denzin & Lincoln,1994, p. xii).

It is the need for the answer that requires the question to be felt. In other words, knowledge remains foreign to those who feel no need for it. There is no technique or pedagogical mechanism capable of artificially producing this movement. Insufficient

knowledge should not lead to individual authoritarianism, but rather to the question that casts thought. The abuse of intellectual power is nothing more than a form of doctrinal censorship. The marginality of a demand pedagogy results, in large part, from the abandonment of educational responsibility. Understanding cannot be imposed, but it is possible to open the way to the question that calls for perplexity.

The question should be understood as a process and not as an isolated act. On this path, the human cannot be eliminated in the name of an alleged objectivity that, taken to the extreme, becomes irrational. The process is revealed in the way each individual surrenders to knowledge and engages with it. “The “choice of research practices depending upon the questions that are asked, and the questions depend on their context” (Nelson *et al.*, 1992, p. 2), what is available in the context, and what the researcher can do in that setting” (Denzin & Lincoln,1994, p. 4).

Educational research can thus be understood as a network of questions and answers, in which the questions constitute the invariable quantities. Once formulated, the question maintains the conceptual situation; the answer does not. The answers change, reformulate and transform over time. It is precisely for this reason that intellectual creation becomes clearer and that we can better understand what drives knowledge itself.

Therefore, the emphasis often placed on answers – or possible answers – as a way of defining the questions or problems posed seems to me to be exaggerated. Questions are not defined by the possible answers they can generate, but by the true answers they offer to other questions. Each answer is part of a wider network of questions, which always includes an unanswered answer. Thus, an answer does not neutralize the problem that gave rise to it. The nature of knowledge is not closed. No answer can present itself as definitive, for in that case it would be promoting itself as Truth. No statement about the world is absolutely unquestionable or undeniable. However, recognizing this openness does not mean falling into a sterile skepticism of repetitive questions.

What we teach — scientific theories — are open systems, permanently exposed to the possibility of falsification. What remains is the question, although it can also be modified, corrected or reformulated. At a close glance, it is curious to note that the greater the number of empirical questions enclosed in a theory and the less theoretical its structure seems to be, the greater the merit attributed to it. The reason is clear: the theoretical understanding is more difficult to quantify.

Empirical explanations present a particular difficulty: they are answers from the world about the world itself. From these answers inevitably arises the need for new explanations. Thus, the explanation moves in the sphere of the logical-empirical, the analytical and the objective, inscribed in an often deterministic causality that tends to see in the comprehension a form of confusion. Understanding, on the contrary, brings with it subjectivity and affectation. Their spontaneity seems to risk error. But is the explanation immune to this risk? Perhaps it is, after all, safer to admit errors in numbers and objects than to fail in a plastic sensitivity of signification projected onto concrete.

These two forms of knowledge organization must remain in constant dialogue, since each is, in a certain way, housed in the other in a reciprocal way. The explanation is to provide determinations, rules, mechanisms and organizational structures. It defines, delimits and orders. However, it is understanding that restores beings, life and living man. The analogy is astonished before the world; logic defines it. Understanding poetizes the world, while explanation tends to mutilate the imaginary universe. Education, however, often leans toward a predominantly explanatory logic. In this sense, “True rationality does not suppress analogy, but feeds on it at the same time as it controls it. There may be deregulation of the analog-logical shuttle; analog excess and logical atrophy lead to delirium; but logical hypertrophy and analog atrophy lead to the sterility of thought” (Morin, E., 1991, p. 133).

The questioning of the philosophical relevance of any and all scientific activity is already the interrogative activity of knowledge. Logic that neglects the question and only considers the answers is false logic. The progression of scientific research necessarily involves the creation of new problems through the assiduous critique of theory. Conscious criticism must submit to the regulatory idea of truth. Truth does not arise openly or covertly because there is a decomposition of responses into shared connections that break and correct themselves. This does not mean that a theory is not valid. The concept of truth is that it cannot be applied to a theory. Validity is defined by the historical man as the one who sees the world. Answers lead to questions, but not all questions lead to answers. Each and every theory includes unanswered questions and for each answer given there is a drive to new questions. This means that the answer not only originates but also directs questions.

Science must be based on questions, not answers, for they are the first to precede science itself. The notion of inquiry brings with it a creative force by the power of the question. “The term “research” derives from the Latin word “investigatio” (in + vestigium). “In” meaning

an action of entering and “vestigium” corresponding to traces, trade mark, sign.” (Sousa, B. A., 2005, p. 10).

The question manifests, shows, unconcealed and demands an answer. Response to the life of the individual, a reality that notifies one's own life. To investigate is also to reflect on oneself. It is still, and no less important, to act upon yourself. It is in the question that the concealment is originally and not in things. To think is to uncover the clandestine and what is obscure. The error is not only in the subject. Reality collaborates in error.

Thus, it is up to the researcher to take on this reflective task and to make explicit to the respondent – or, more appropriately, to the one with whom he or she establishes a dialogue – the objectives that guide the interview itself. It is also his responsibility to avoid deviations from thought by organizing and sequencing questions in such a way as to maintain the guiding thread of reflection. This ensures that the conceptual discussion remains guaranteed or at least sufficiently clarified throughout the dialogue process. The suggestion of the answer or the disagreement does not make sense in the immediacy of the context between interlocutor and interviewee. It takes time to understand meanings, later maturing the voices that reflect thoughts and representations that will be analyzed, reflected and evicted from our own conceptions of the world.

4 ETHICAL PRINCIPLES IN EDUCATIONAL RESEARCH AND DATA PROTECTION

The submission of a research project to the evaluation of its ethical dimension implies compliance with a sequential procedure that normally involves, in a first phase, the request for an opinion to the Data Protection Officer and, only subsequently, the submission of the process for institutional evaluation, namely to the Ethics Committee or competent body for this purpose.

This process can be time-consuming and the first step is to request an opinion from the Data Protection Officer of the host institution, by means of a form and a declaration of honour, according to the information available on the respective institutional page. The forms and documents, as well as the information required for this purpose, are accessible in the area where this type of opinion is requested. At this stage, all required documents must be completed, including, where applicable, a declaration of honour signed by the researcher and the supervisor or supervisor, as well as copies of the scripts, surveys or data collection tool associated with the study.

Only after obtaining the favorable opinion of the Data Protection Officer should the process be initiated with the respective Ethics Committee. It is important to underline that the Ethics Committee is an autonomous entity and independent of the Data Protection Officer; however, it is not possible to obtain an ethical opinion without the prior data protection procedure having been completed. It is therefore essential to comply with Directive 95/46/EC (Data Protection Directive) and, consequently, with the General Data Protection Regulation (GDPR) which is the latest European data protection standard is Regulation (EU) 2016/679, known as the GDPR, in force since 25 May 2018. Unlike the Directive, the GDPR is a mandatory European regulation which means that it is directly applicable in all Member States.

The General Data Protection Regulation (GDPR) is based on a set of structuring principles that guide all processing of personal data. First, it requires processing to be carried out in a lawful, fair and transparent manner, ensuring that data subjects know who is processing their data, for what purpose and on what legal basis. This is followed by the purpose limitation principle, according to which data must be collected for specific, explicit and legitimate purposes and not further processed in a way incompatible with those purposes.

The GDPR also enshrines the principle of data minimisation, stipulating that only data strictly necessary for the purpose in question is collected. To this is added the principle of accuracy, which requires the updating and correction of data where necessary, as well as the principle of storage limitation, according to which data may not be kept for longer than necessary.

In turn, the principles of integrity and confidentiality require the adoption of appropriate technical and organisational measures to protect data against unauthorised or unlawful access, loss or destruction. Finally, there is the principle of *accountability,* which requires the controller not only to comply with the rules, but also to be able to demonstrate such compliance.

In addition to these principles, the GDPR significantly strengthens the rights of data subjects. Among the main rights are:

- the right of access to your personal data;
- the right to rectification of inaccurate data;
- the right to erasure (“right to be forgotten”);
- the right to restriction of processing;

- the right to data portability, allowing data to be received in a structured format and transmitted to another controller;
- the right to object to processing in certain circumstances;
- the right not to be subject to automated decision-making, including profiling, where it produces legal effects or significantly affects their legal sphere.

In Portugal, the GDPR is complemented by Law No. º 58/2019, which ensures its implementation in the domestic legal order, and supervision is entrusted to the National Data Protection Commission (CNPD).From a practical point of view, the regulation introduced increased requirements for organisations, such as carrying out data protection impact assessments (DPIAs) whenever the processing presents a high risk to the rights and freedoms of individuals, the appointment of a Data Protection Officer (DPO) in certain situations, as well as the obligation to notify personal data breaches to the supervisory authority and, in certain cases, to the data subjects themselves. Failure to comply with its provisions may result in administrative fines of up to EUR 20 million or 4% of the organisation's overall annual turnover, whichever is higher.

Once the GDPR has been complied with, the investigator must proceed to request an opinion from the Ethics Committee. This request must be formalised by filling in the appropriate form, if any, normally available on the institutional page of the institutions holding this Commission. We recommend that such documents be guaranteed in the mother tongue of the home institution and in English as a working language. Following the guidelines of the forms, it is necessary to guarantee their signature and review of the delivery of the documents as a *checklist check.*

Documents should be attached to the form, such as: (i) the information document to the participant and the informed, free and informed consent to participate in the study, drawn up according to the institutional or accredited entity templates, the model varies depending on whether the data collection is in person or online; in the case of minor participants, the declaration of consent by their legal guardian is mandatory; (ii) the data collection tools to be used, such as scales, questionnaires, observation or interview scripts, among others; (iii) the favourable opinion issued by the Data Protection Officer; (iv) the statement of the supervisors, when the principal investigator is a student, which is not to be confused with the declaration of commitment of honour; (v) a copy of the notification and the respective opinion issued by competent regional, national, European or international authorities, when applicable, such as

the regional directorates in the case of studies carried out in schools; (vi) the favourable opinion or authorisation of the heads of entities external to the host institution where the study will be carried out, when applicable; and (vii) the declaration of the existence or absence of conflict of interests, whenever applicable.

It is essential that the planned date for the start of data collection is after the date of the request for an opinion to the Ethics Committee. It should also be ensured that all documents and instruments submitted are properly anonymised and do not contain identification of persons, companies or institutions. Naturally, this request must be accompanied by authorisation for collaboration or institutional participation. To this end, a formal request must be made which, after being duly signed by the parties, will be attached to the file to be sent to the bodies responsible for issuing the institutional ethical opinion. If the instruments are applied in institutions where internationalisation is a criterion for institutional development then they must be translated into a second or more working languages of the country where the institution is based and with the respective *Data Sharing Agreement*.

The request for an opinion should be sent by e-mail or otherwise, but always duly signed and dated. After submission, the file will be distributed to one of the rapporteurs of the Commission. Decisions must be clear and may take the form of an “Opinion in favour”, “Opinion subject to change” or “Opinion in favour”. The final decision will be communicated to the researcher by the institutional secretariat of the Ethics Committee.

5 FIELD DEFINITION AND ACCESS TO INFORMATION

Places, persons and contexts must be determined by context (Lecompte, M. and Preissle, J., 1993, p. 89) and by free and informed consent signed by informants (Rodrigues, L., 2023). It is the creation of an epistemic theory that recognizes the importance of diversity and the fact that this theory seems to be undermined by practice. We also have to decide where it will be easier to have “access to information” (Hammersley & Atkinson, 2005, p. 54).

> “The choice of which strategy to adopt must be mindful of the purposes of the research, the tome scales and constraints on the research, the methods of data collection, and the methodology of the research. The sampling chosen must be appropriate for all of these factors if validity is to be served.” (Cohen, Manion & Morrison, 2004, p.104).

We must resort to everything possible: personal agendas, notes, reports, class council minutes, informal conversations, institutional quantitative data, governmental, study plans, teacher training plans, training plans of schools and unions, informal, face-to-face and non-

face interviews, conversations of bars and cafes, dinners and social gatherings should serve to remove all possible information, provided that there is free and informed consent, signed, by the informants. It is almost the Nietzschean (de)constructive philosophy in which everything serves us to clarify life. It is to extend the creative hands to the future and to this task all that exists serves as a means, as a tool, as a hammer. Knowledge is creation.

6 PARTICIPANT OBSERVATION

"The main requirements of observation are (…): a peeking eye, a thin ear and a good memory" (Woods, 1998, p. 56). Here we will not list the various types of participant observation. More information on this type of observation can be found in Lapassade, G., "L'Observation Participante" *in* L'Observation Participante dans les situation interculturelles, pp. 18 to 23; Lapassade, G., L'Ethnosociologie, pp. 37 to 42; Sabirón Sierra, F., Methods of ethnographic investigation in Social Sciences, pp. 362 and 363.

This reflection on the techniques of research in Social Sciences was born from a concern with what we can call dropping out of school in secondary education. It was there that I realized that the design of any research, in terms of time and space, will often depend on the sponsors of the research, and that financial support is fundamental to proceed to the learning of best practices and this implies leaving our space of institutional comfort. There is no point in discussing the "other-site *syndrome"* (Woods, P., 1998, pp. 62 and 63). It is necessary to decide, and in the case of ethnography, in particular, the position of "external participant observer" (Lapassade, 1994, p. 20), which has a limited and therefore partial time (Sabirón Sierra, 2006, p. 363), and which aims to collect data and draft its work (Sabirón Sierra, 2006, p. 363). It is someone who is outside, but who participates in some way in the activities of the observed group.

7 OBSERVATION AND FIELD NOTES

Field notes are another tool that can be used, provided that they comply with ethical and legal guidelines (Rodrigues, L., 2023). "Sometimes we have to make a lot of observations (…) in various situations before we can start the analysis. It is therefore important to note the comments. This is achieved with field notes. Field notes are essentially notes made during the day to refresh the memory about what was seen and what is wanted to be recorded, and more extensive notes written later, when there is more time to do so (Woods, 1998, p.

I remember that, many times, in observation processes I took notes sitting at the bus stop. Other times, before some curious faces, the notes were simply taken in a cafe or garden. For this, I used to wear a black cape. To record the reflections and extra information I used a white sebenta without lines. 'I use a large hardcover notebook, where, on one side of the page, I record the 'field notes', and on the other side, the 'reflections' (…) (Woods, 1998, p. 61). In general, white sebenta was used at night, after dinner. It has often taken some distance to "clean up" our own thought processes" (Woods, 1998, p. 50) to ensure reflective openness.

We should avoid falling victim to maladjustment syndrome (Hammersley & Atkison, 2005, p. 131), but it is understandable that there are times when tiredness overrides the need to take advantage of time. I remember, on one occasion, in Vienna, when I had to ask Zion to return to the hotel because her ears were already saturated and my attention was completely diverted. The understanding of this interviewee was fundamental. It should be noted that, at that time, I did several interviews on the same elements. Only one was recorded. The remaining conversations were recorded in the black sebenta. Resistance to some questions implied a change in the manner of asking (Hammersley & Atkison, 2005, p.

There are always many more people interviewing, many more impressions to record, but at "all research comes a time when fieldwork has to be finalised. (…) Leaving the field can often be difficult; it is usually about saying goodbye to those with whom we have established a relationship, making contacts for the future (…) and generally smoothing out the match" (Hammersley & Atkison, 2005, pp. 138-139).

8 THE INTERVIEW

Scripts should be drawn up for conducting semi-directive interviews (Woods, 1998, pp. 91 to 95), even if they can be abandoned in the paper or digital version, because more than bothering the interviewee can afflict the interviewer. But I used the portable recorder to make sure that nothing of the information was lost and "(…) whenever possible it is advisable that the ethnographer records the interviews" (Woods, 1998, p.204). I am aware that there are always elements "around speech and non-verbal communication" that are lost (Woods, 1998, p.204). I was careful to combine with the various participants in this work separately and particularly in places that would *suit the* interviewee (Woods, 1998, p.

The interviewer's plasticity is not always easy. I remember that. I had a case where one of the Austrian interviewees, Zion, considered that the Portuguese were "wild". In another situation, Maria said that "these *things cost all the money and it is not Madeira's gross*

national product that pays for it. … is the landlord, the continent that pays for it.' He added that the investigation into education is a fraud. I knew what I would have to lose if I argued and so I chose to maintain “trust, curiosity and naturalness” (Woods, 1998, p. 77).

The goal, with all interviewees, should be to create a relationship where the interlocutor could entrust their representations not so much to the project as to the interviewer himself. That the interviewee was interested “in me for myself” (Woods, 1998, p. 78) […] where opinions would be heard and considered without being sentenced, however “absurd and ill-expressed they might seem” (Woods, 1998, p. 78). “An interview in a certain sense is an opportunity: someone's opportunity to express how they see the world” (Woods, 1998, p. 84).

“Confidentiality (..” has to be ensured for all interviewees (Woods, 1998, p. 78) prior to data collection. The same applies to the names of the institutions and all those who participated in the data collection phase. In relation to schools and institutions, their identification should be avoided and only their space should be possible so that we can contextualize them geographically, socially, culturally and economically. Care must be taken to request permission and free and informed consent (Woods, 1998; Rodrigues, 2023) in writing to carry out the research work. For ethical reasons, we should not attach the respective authorizations *to open-access* works, or simply published with access by third parties, since they generally contain the names of the participating institutions. However, in the case of public tests they must be available if requested by the selection board. Hence the importance of coding informants (Rodrigues, L., 20023) and giving fictitious names to those who, with us, have worked on research projects in sciences (other than just social ones) and that allow us to collect data.

The choice of people (Hammersley & Atkinson, 2005, p.6) to be interviewed may follow different itineraries. Everything depends on what is most useful to the investigation and to the fulfillment of the schedule. It is important to ensure that the data is collected and to turn off the recorder whenever we are asked to do so. In general, not because the interviewee does not want to answer, but because he does not want his words to be recorded. It is the “right of the interviewee to refuse to answer certain questions” (Hammersley & Atkinson, 2005, p.159).

All interviewees can be selected by the researcher himself. We have to make sure that these people are the best placed to give us the information we need. Sometimes we become dependent on volunteers, as some potential informants refused the possibility of being interviewed. Language itself may be an obstacle to investigation, but it will never be insurmountable.

A curiosity was the way I addressed myself, in 2004, in a doctoral work to the various interviewees. In the case of the EPA2 School Director, I was careful to choose a more formal outfit (which is unusual). I did not go as far as the case described by Sikes, Measor and Woods (Woods, 1998, p. As for the students and other interviewees, informality in the treatment and in the appearance itself was an added value. I think that the proximity not so much of age, but of figure may have been an advantage (Woods, 1998, p. Still in the same work, it was singular that students at the Neusiedl Am See tourism school thought I was a police investigation officer. The problem was based on a translation problem. The teacher who invited me to meet the school used the term *investigator* instead of *researcher.* The students were very receptive and saw in me someone who seemed to them to be more a curious and lonely tourist and than a researcher.

Interviewing someone is removing social representations through a voice and “in a certain sense, speaking amounts to legitimising, which is confirmed by the attitude of “silent listening” on the part of the figure representing authority” (Woods, 1998, p.53). I remember one Sunday in Vienna when I met, through Yola, a Romanian emigrant, who studied at an Austrian vocational school, but had to leave the interview because he was drunk. In addition to sensing some danger (Henslin also refers to his nervousness in Woods, 1998, p. 115), the interviewee's observations were completely misplaced.

After the interviews, the transcriptions are followed (Cohen, Manion & Morrison, 2004, p.281) which “provide fascinating documentation of the complexities of the process” (Hargreaves, A., quoted by Woods, P., 1998, p. 57). Sometimes there is the feeling that it is hard work, but persistence, fortunately, is one of the qualities of any human being. Even more so in an investigator. In the interview, what matters “is that the interviewer gets to “know” his subjects without any need to commit to a reciprocal process of personal “social stripease”””” (Woods, 1998, p. 83). We draw attention, in the case of the use of ethnography, that there is a “tendency among ethnographers to favour indirect interviews in which the interviewee speaks when he or she wants and in his or her own terms. (…) Indeed, it is true that the influence of the investigator on the production of information is a fundamental issue, but it is misleading to see it simply as a kind of sesgo that must be eliminated. (…) neither the undirected interview nor reliance on unsolicited reports solves the problem' (Hammersley & Atkison, 2005, p. 146).

One way or another, we are not blind or indifferent to our own knowledge. In fact, before we go to the ground every fundamental theoretical revision must be carried out. All theoretical capital work must be thought and written. The issue is not, and could not be,

blindness in research to information. We are theoretical beings (I do not know if we can add *by nature)* and theory always guides all our practical action of investigation. Drawing up tables to better situate the work of the interviews is fundamental and that is where it is perceived that the interviews become, in some way, a participant observation.

The interview is a source of meaning because it reveals unobservable things, that is, it deals with the perspective of the interviewee and creates a structure of comfort and security that allows the informant to respond clearly and honestly (Cohen, Manion & Morrison, 2004). Of course, we will always be in the subjective realm of intentions, but there is no reason not to believe what is said. Even because the interview is the possibility of entering the world of the interviewee and the quality of this whole process will always depend on the interviewer who is, at the outset, a researcher.

Thus, the definition of an “interview should clarify” (LeCompte & Preissle,1993, p.54):

- To whom?
- Why?
- For what?
- How?
- When?

The qualitative interview can be 1) structured (standard); 2) semi-structured or 3) non-structured (informal). See more in Cohen, Manion & Morrison, 2004, p. 271.

8.1 THE STRUCTURED INTERVIEW

As the name implies, this type of interview reduces the flexibility and spontaneity of the interviewee, but significantly increases the ability to analyze the data at a later stage, as well as making replicability easier and more efficient (Cohen, Manion & Morrison, 2004, p.

The rigidity of the script reduces and, in some cases, nullifies the possibility of deepening issues that were not previously thought by the investigator. In addition, the circumstances and elements of each interviewee, from an individual point of view, are not considered during the process. This means that there are no changes to the script structure and it becomes a kind of closed oral questionnaire that minimizes variation between questions. Thus, the evaluation and analysis of the answers during the interview does not occur because there is a kind of pre-determination of the response by conditioning the speech and the choice of words.

This results in greater uniformity of information, precisely because the questions are asked to the interviewee as written in advance by the researcher. Thus, it is possible to have several interviewers at the same time and the possible categories of response are already defined.

8.2 THE SEMI-STRUCTURED INTERVIEW

This type of interview requires a script prepared and validated previously. This script has guiding blocks to the development of the interview and seeks to ensure that all interviewees answer the same questions. In this sense, it is not mandatory to follow the questions rigidly, but it is expected that all questions, or at least the objectives by blocks, are covered, that is, answered during the interview.

There is a kind of *checklist* and the script serves the development of the interview in a logic of adjustment to the interviewee.

As a rule, this type of interview offers a lot of freedom to the interviewee and we should be careful not to exceed ourselves in time. In fact, this can be a strong point, since availability means willingness to participate, but we have to put limits on interviewees and interviewers.

This data collection tool, because it has a script, facilitates the categorization process and the systematic processing of data. It is particularly recommended for group interviews and allows an in-depth analysis of the topics covered. It is called a semi-directive interview because one does not expect to introduce new questions, but one does not close this possibility.

8.3 THE UNSTRUCTURED INTERVIEW

The unstructured interview is characterized by being informal, open, in some cases of an ethnographic nature and is in-depth. It flows in the mode of development of a normal conversation (Cohen, Manion & Morrison, 2004, p. It often occurs in the context of participant observation and people may not realize that they are being interviewed, which raises major ethical questions. Hence the fundamental information about the research project, the guarantee that all participants sign the informed, free and informed consent from the beginning of the work. This also requires the full respect and authorization of the Data Protection Officer and, in parallel, a positive institutional opinion of an Ethics Committee.

In this type of interview most questions emerge from the context immediately and there is no previous script. That is why it is unstructured. This type of interview can happen several

times. The idea is to make the interviewee comfortable enough to speak whenever he wants.

This type of interview is very valuable because it allows the interviewer to respond to individual differences and situational changes. This means that, at the turn of contexts, issues can be individualized and adjusted to improve communication immediately. On the other hand, this strategy requires a lot of time to obtain systematic information and depends a lot on the capacity and training of the investigator.

This type of interview can be transfigured into an ethnographic interview, but it is not to be confused with an informal conversation. In the case of the ethnographic interview, the change of roles between the dialoguers is asymmetric and it is up to the researcher to encourage the expansion of the interviewee's discourse. Ignorance and interest are ours. The knowledge belongs to the other.

8.4 INTERVIEW WITH FOCUS GROUP

The focus group, also known as the discussion group, is a technique that aims to collect data and can be used at various times of the research process. Morgan (1996, 1997) defines focus groups as a research technique of collecting data through the interaction of the group on a topic presented by the researcher. This definition, according to the author, comprises three essential components: focus groups are a research method aimed at data collection; locates interaction in group discussion as the source of data; and, recognizes the active role of the researcher in stimulating group discussion for data collection purposes.

> “Focus groups might be useful to triangulate with more traditional forms of interviewing, questionnaire, observation, etc. There are several issues to be addressed in running focus groups, for example (Morgan, 1998: 41-8):
> • deciding the number of focus groups for a single topic (…);
> • deciding the size of the group (…);
> • how to allow for people not 'turning up' on the day. (…);
> • taking extreme care with the sampling (…);
> • ensuring that participants have something to say and feel comfortable enough to say it;
> • chairing the meeting (…).” (Cohen, Manion & Morrison, 2004, p. 288).

Krueger and Casey (2009), in addition to the characteristics described above, also emphasize the focus of the discussion on a given subject, its contribution to the understanding of the topic of interest and the fact that the participants that compose them have some characteristic in common and pertinent to the topic under discussion. According to Soares *et al* (2014), focus groups, when combined with other methods, can occur at different

stages of the research project, namely: initial stage (e.g., generation of questions for a questionnaire); intermediate stage (e.g., helping to interpret the results obtained in a questionnaire); final stage (e.g., discussing the results obtained with participants, which can lead to new insights) (Krueger & Casey, 2009; Stewart *et al.*, 2007).

Recruitment of informants is a systematic process, with the traditional approach being as follows: two weeks before the focus group, participants should be contacted; after one week, they should receive a confirmation letter and, on the eve of the focus group, they should be contacted by telephone. In any case, they will be informed of the objectives, the investigation team and all the investigation procedures, ensuring the confidentiality of the data by assigning a code to each informant and respective destruction of the raw data as soon as the triangulation of the research data is carried out.

Focal group interviews are based on a voluntary record of participation in the research. In all cases, in the use of any technique, the anonymity and confidentiality of identities, data protection and right of image of informants will be guaranteed. This technique of interviewing groups brings a plural vision of perspectives and clearly values 'social and interpersonal processes' (Fontana and Frey, 1994, p. 125), which are also useful to research in some way.

9 DOCUMENTARY ANALYSIS

Qualitative work, particularly in ethnography and case study, is probably one of the paradigms that allows the creation of emotional partnership that does not evade the analysis of the possible conditions of plausible reconstruction, through a logic guided by analytical induction (Hammersley & Atkison, 2005, p. To this end, we also use documentary analysis, which allows us to represent the 'content of a document' (Sousa, 2005, p. 262). This presentation aims to obtain the relevant information and assist in understanding this “same information” (see the procedures for document analysis in Sousa, 2005, pp. 263 to 264).

'Records, schedules, minutes of meetings, plans, lesson plans and notes, confidential documents on pupils, textbooks, periodicals and magazines, school recordings, archives and statistics, announcements, exhibitions, official letters, texts, exercise books, examination documents, worksheets, slate works, photographs' are considered official documents' (Woods, 1998, p. 105).

Documentary analysis is a methodological procedure that aims to represent, organize and interpret the content of documents relevant to the investigation. These documents may include institutional reports, regulations, meeting minutes, curriculum plans, textbooks and

other materials produced in the educational context. This technique allows to complement other data collection techniques, contributing to a more comprehensive understanding of institutional contexts and educational practices. By analyzing institutional documents, the researcher can identify normative guidelines, institutional discourses and organizational transformations that influence the functioning of educational institutions.

A distinction should be made between documentary analysis and content analysis. While the former focuses on documents as formal sources of information, content analysis focuses on messages and communications – textual, visual or symbolic – seeking to identify underlying meanings, discursive structures and analytical categories. Its purpose is to decompose and interpret the categories that reflect the nature of the material examined and its relationship to the purposes of the investigation.

Content analysis thus assumes a hermeneutic dimension, developing through a process of inference that articulates methodological rigor and reasoned interpretation. It is a procedure that oscillates between the objectivity required by the method and the subjectivity inherent in the interpretative act, seeking to make explicit latent meanings and significant structures that are implicit in the analyzed message.

10 CONTENT ANALYSIS

Content analysis is not to be confused with document analysis since the former focuses on messages, or communications, and not on official documents. It is intended to discern and refine the sense(s) that are structurally immersed in the discourse, textual or not. It seeks to “identify categories and units of analysis, both reflecting the nature of the document analysed in relation to the purpose of the investigation” (Sousa, 2005, pp. 265). It is a deductive procedure, since 'content analysis oscillates between the two poles of the rigor of objectivity and the fecundity of subjectivity' (Bardin, 1977, p. 7). This effort of interpretation is intended to bring out what is latent and to unmask meanings that are found in the message.

A hermeneutic dimension is developed through a process of inference that articulates methodological rigor and reasoned interpretation. It can be vertical, therefore, for each case, and/or horizontal that allows comparison between cases after a finer evaluation of the vertical content analysis. For Bardin (2011), Vala (1986) and Krippendorff (2018), this methodological procedure should be oriented towards the systematic and controlled interpretation of communications.

The constructions of categorical systems can be based on a mixed procedure — deductive and inductive — linking the theoretical framework with the exploratory reading of the empirical corpus. The definition of categories and subcategories should respect the principles of completeness, exclusivity, homogeneity, relevance and internal coherence, ensuring analytical consistency and interpretative validity (Bardin, 2011; Vala, 1986).

Content analysis is organized (Bardin, 2011) in three major phases: (i) pre-analysis, which involves the organization of the corpus, the formulation of hypotheses and the definition of indicators; (ii) exploration of the material, corresponding to the coding and categorization process; and (iii) treatment of results, inference and interpretation. Vala (1986) stresses the importance of clear and operational definition of categories as an essential condition for methodological rigour, arguing that they should be mutually exclusive and theoretically grounded. Krippendorff (2018) emphasizes that content analysis should ensure validity, reliability and replicability, maintaining that transparency in the coding process is critical to scientific credibility.

As a qualitative research technique, content analysis allows the systematic interpretation of verbal communications produced in an interview context, enabling the identification of meanings, discursive patterns and social representations present in the participants' discourse (Bardin, 2011; Krippendorff, 2018). The analytical process is developed in successive stages that include the full and comprehensive reading of the corpus, the definition of the units of registration and context, the construction of the categorical system, the coding of the empirical material and, finally, the reasoned interpretation of the data.

11 THE CATEGORIZATION PROCESS

Categorisation essentially involves two stages: 'inventory and classification' (Bardin, 1977, p. 112). In the first moment the various elements are “isolated” (Barroso, 2007, p.31), in the second moment they are divided so that the message can be (re)organised. “Categorisation has as its primary objective (in the same way as document analysis) to provide, by condensation, a simplified representation of raw data” (Bardin, 1977, pp. 112-113). The idea that content analysis does not produce deviations is excessive, i.e. “this is perhaps an abuse of the confidence one can have in the proper functioning of this delicate instrument” (Bardin, 1977, p.113).

Categories are thus “registration units which appear under a generic heading” (Bardin, 1977, p.111) and which are grouped according to what is common in a group of elements. The subcategories follow the same principle, but being more closed relate directly to the category from which the categorical subsystem is created. “At this stage there is no concept formation, no import or discovery of theories, no creation of new thoughts. The aim is to give the material a form that leads to such ends, and this means ordering the data in a coherent, complete, logical and succinct manner” (Woods, 1998, p. 139).

The categories emerge from the data themselves and they are the ones that will drive the systematization. “The first step is to identify the most important categories, which in turn can be divided into groups” (Woods, 1998, pp. 139-140). Both document and content analysis and quantitative analysis can be conceived as vertical analysis (individual - in the case of quantitative analysis it will be an annual analysis - and with the respective conclusions) and, subsequently, it is advisable to carry out a horizontal analysis that gives us a holistic view of the data. Using information blocks in the interview scripts can be very useful for the interviewer's guidance and less as a reader's guide. It will be fundamental for the process of categorization and classification of content analysis of interviews, as well as for the schematization of document analysis.

12 THE TRIANGULATION

The plasticity of the researcher in social sciences implies that his or her look at contexts makes it possible to 'think not only realistically and concretely about them, but what is more important, creatively and imaginatively with them' (SAID cited by Silva, P. 2003, p. 37). The scope of qualitative work lies not in its generalisation to other contexts, but in the possibility of testing these results in other contexts. “It must be warned that we are not dealing with absolutes: neither with absolutely objective knowledge nor with absolutely subjective knowledge” (Woods, P., 2001, p. 65). The quality of a work is always determined subjectively, which does not mean that science is 'intuitively grounded' (Lecompte, M. and Preissle, J., 1993 p. 354).

The external validity of ethnographic research is possible through a logical and “internally crafted” sequence (Woods, P., 2001 p. 66), i.e. problems studied locally can be placed on a broader scale. It is the defense of the nomothetic principle that generalizes, both by comparison and by theory. On the other hand, the discovery of immutable truths by unshakable proofs is not intended. Rather, it is intended to understand a given context in

terms of action. The ideographic view of ethnography is based on the description of specific situations (Lecompte, M. and Preissle, J., 1993, p. 354) and in this sense refuses to generalize to other contexts (Lecompte, M. and Preissle, J., 1993, p. 354). “In my personal opinion, the “ideographic” and “nomothetic” approaches are not mutually exclusive, as we can have a rich and intense and at the same time generalizable description (Woods, P., 2001, p. 66). Thus, even 'being local, postmodern knowledge is also total because it reconstructs local cognitive projects, highlighting their exemplary nature, and thereby transforms them into total illustrated thought' (Santos, B.S., 2003, p. 48).

The use of a 'variety of techniques, strategies and instruments' (Sabirón Sierra, F., 2006, p. 317) enables discovery and exploitation that guarantee the internal validity of ethnographic research, which is why data collection can be carried out by both 'subjective and objective' instruments (Lecompte, M. & Preissle, J., 1993, p. 355). We insist that this distinction is purely artificial. In one way or another, ethnography is both a process and a result of research itself, where the “investigator himself is a research tool” (Hammersley & Atkison, 2006, p. 34).

We must always minimize possible distortions arising from our own convictions through an inquiring and analytical reflection. In a logic that reconstructs a “socially defined” reality (Berger & Luckman, 1976, p. 124). “We do not suggest that researchers disengage from the effects of their work on the world” (Hammersley & Atkison, 2006, p. 36), but it is important that we know that our main goal is to produce knowledge. Whether or not there is production of knowledge, whether or not what has been produced has a social impact, whether or not it serves to effect change in the world must also be part of our reflection and that is to redefine social research.

Qualitative research will be all the stronger, the more to guarantee the triangulation of data, i.e.

> “Qualitative research is inherently multi method in focus” (Flick, 1998, p. 229). whether, the use of multiple methods, or triangulation, reflects an attempt to secure an in-depth understanding of the phenomenon in question. Objective reality can never be captured. We can know a thing only through its representations. Triangulation is not a tool or a strategy of validation, but an alternative to validation (Flick, 1998, p. 230). The combination of multiple methodological practices, empirical materials, perspectives, and observers in a single study is best understood, then, as a strategy that adds rigor, breadth, complexity, richness, and depth to any inquiry” (Denzin & Lincoln,1994, p.5).

Methodological triangulation in the social sciences refers to the simultaneous use of multiple methods or data sources to examine the same phenomenon. The aim is to strengthen the validity and credibility of research by comparing results from different perspectives. Different basic types of methodological triangulation are identified: triangulation of data (collection at different times, locations or groups), of researchers (multiple researchers), of theories (various conceptual perspectives) and methodology (combined qualitative and quantitative methods). (Cohen, Manion & Morrison, 2004, p. 113). These arrangements provide complementary evidence that compensates for the limitations of each isolated approach, increasing analytical rigour and reliance on conclusions (Cohen, Manion & Morrison, 2004, p.

In practice, triangulation requires samples and different data collection tools and can be "(…) defined as the use of two or more methods of data collection in the study of some aspects of human behaviour. It is a technique of research to which many subscribe in principle, but which only a minority use in practice" (Cohen, Manion & Morrison, 2004, p. 112). For example, it is possible to collect data in different environments or periods and integrate qualitative and quantitative techniques. From there, it is possible to cross-check the analysis of these data to identify convergences and discrepancies that enrich the interpretation. It is it, triangulation, that allows us to validate (Cohen, Manion & Morrison, 2004, pp. 107-109), credibility and scientific rigor.

13 FINAL CONSIDERATIONS

Research in Education, as a situated and reflective scientific practice, requires a permanent exercise of articulation between epistemological assumptions, methodological options and ethical responsibility. Throughout this article we tried to demonstrate that there is no privileged methodology in the abstract, but rather methodological choices that must emerge from the nature of the scientific problem formulated and the context in which it is inserted.

Qualitative research, particularly in an educational context, confronts the researcher with the complexity of the social world, where subjects, practices and institutions intersect in a fabric of plural meanings. In this sense, understanding implies interpreting, and interpreting implies recognizing the inevitable presence of pre-understanding, historicity, and the investigator's reflexivity. Far from being an obstacle, this reflective dimension is a condition of scientific rigour and transparency.

Participant observation, semi-directive interviews, field notes and documentary analysis are fundamental instruments for the construction of situated knowledge. However, it is in content analysis and particularly in the process of categorization that the researcher operates the passage from raw empirical material to the construction of meaning. Inventory, classification and categorical organization are not mere technical procedures, but decisive moments of interpretation and inferential systematization.

Categorization, as a process of condensation and reorganization of data, requires a balance between objectivity and subjectivity, between analytical rigor and hermeneutic sensitivity. The methodological triangulation, the explicit construction criteria of the categories and the vertical and horizontal analysis of the data are essential strategies to ensure validity, consistency and interpretative depth.

The content analysis process develops in a systematic and sequential way, starting with the fluctuating and integral reading of the corpus, with a view to the global apprehension of the empirical material. This process is followed by the definition of record units and context units. This will be a fundamental step to delimit the significant segments of the discourse to be encoded. Subsequently, we proceed to the construction of the categorical system, the coding of the material and, finally, the treatment, inference and interpretation of the results (Bardin, 2011; Krippendorff, 2018).

The construction of categories can assume a deductive nature, when it results from the theoretical framework and research objectives; inductive, when it emerges from the participants' own discourse; or mixed, when it articulates both strategies (Vala, 1986; Schreier, 2012). Irrespective of the procedure adopted, the categorical system must comply with strict methodological criteria, namely completeness, mutual exclusivity, internal homogeneity, analytical relevance and conceptual coherence, ensuring validity and interpretative consistency (Bardin, 2011; Krippendorff, 2018).

The grids presented are an example of the operationalisation of the categorical system applied to the analysis of interviews, structured in thematic blocks identified from A to N. Each block includes categories and subcategories accompanied by their respective operational definitions, making it possible to explain the coding criteria and ensure transparency in the analytical process. This organization favors the systematization of empirical material and reinforces the reliability of the analysis procedure (Krippendorff, 2018; Schreier, 2012).

On the other hand, the ethical dimension goes through the entire investigative process. Informed consent, confidentiality, encoding of informants and responsibility for disseminating

results are not mere administrative formalities, but structuring foundations of scientific integrity.

It is concluded, therefore, that research in Education cannot be reduced to a set of techniques applicable mechanically. Rather, it is a demanding intellectual and ethical process that articulates theory and practice, explanation and understanding, analytical distancing and reflective involvement. It is in this creative tension that educational research finds its scientific legitimacy and transformative potential.

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