

# I. THE THEORETICAL ANALYSIS OF THE CONCEPT OF SOCIETY: THE PARADIGM OF THE PAST AND PRESENT



## HISTORY RESEARCH METHODOLOGY IN THE WORKS OF MAX WEBER<sup>1</sup>

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**Summary.** The article explores the relationship between historical and sociological approaches in the concept of Max Weber. Based on an analysis of the content of the basic sociological concepts that he uses (“ideal type”, “social action”, “understanding” sociology, “rationalization”, “methodological individualism”), the author concludes that the foundation for Weber’s socio-historical views are general epistemological and methodological principles of his sociology. But their ambiguity led to the contradictory views of the German sociologist, regarding the nature of historical development.

**Keywords:** ideal type; social action; affective action; traditional action; value-rational action; purposive-rational action; “understanding” sociology; rationalization; methodological individualism; protestantism; industrial society.

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Max Weber (1864–1920), a German economist, historian and eminent sociologist, is often called in the West the «great bourgeois antipode of Karl Marx» or even the «Marx of the bourgeoisie». His innovative works are characterized first of all by a deep penetration into the subject of research, the search for the initial, basic elements with which one could come to understand the laws of social development.

The main tool of generalizing the diversity of empirical reality, in Weber's opinion, is the concept of «ideal type». The «ideal type» is not simply extracted from empirical reality, but constructed as a theoretical model, and only then correlated with empirical reality. For example, the concepts of «economic exchange», «capitalism», «craft», etc. are only ideally typical constructions used as a means to depict historical formations. Unlike history, where specific events localized in space and in time are explained causally (causal genetic types), the task of sociology is to establish general rules for the development of events

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without regard to the spatio-temporal definition of these events. As a result, we obtain pure (general) ideal types.

Sociology, according to Weber, should be «understanding» – since the actions of the individual, «the subject» of social relations, are meaningful. And meaningful (supposed) actions, relationships contribute to the understanding (prediction) of their consequences.

One of the central points of Weber's theory is the selection of an elementary particle of an individual's behavior in society – social action, which is the cause and effect of a system of complex relationships between people. «Not all types of relationships between people are social in nature; socially, only that action, which in its meaning is focused on the behavior of others» [3, p. 625]. Social action is always correlated by the meaning assumed by its subject with the behavior of other persons and is oriented towards them. Or, in the words of Weber himself, this is an action «which, in its implied acting or acting sense, is correlated with the behavior of other people and is guided by it in its course» [4, p. 68].

The scientist identifies four types of social action:

1. Traditional action – is formed on the basis of imitation of certain patterns of behavior (based on the strength of habit, accepted norm, etc.), «often this is only an automatic reaction to habitual irritation in the direction of the once assimilated installation» [3, p. 627].

2. Affective action due to affects or emotional state of an individual. «A purely affective action is also on the border and often beyond what is “meaningful”, consciously oriented, – Weber writes, – it can be an unobtrusive response to a completely unusual irritation» [3, p. 627].

In the strict sense, affective and traditional actions are not social. Weber takes them beyond meaningfulness, because in these cases, the acting subject in his motivation does not rely on an individual (subjective) meaning [2, p. 53]. According to P. P. Gaidenko, «only the value-rational and purposive-rational actions present themselves as the social actions in the Weberian meaning of the word» [1, p. 20].

3. The third type of social action is value-rational. «The value-rational orientation of an action differs from affective behavior by the conscious determination of its orientation and the successively planned orientation to it» [3, p. 627]. The main thing here is not a spontaneous reaction aimed at immediately satisfying the need for something (enjoyment, revenge, possession), but focusing on certain «commandments» or «requirements», in obedience to which the given individual sees his duty, despite for possible consequences. Value-rational action is always associated with certain values (ethical, religious, aesthetic, etc.), which seem to be extremely important for the individual.

4. To the greatest extent, the concept of an ideal type corresponds to a purposive-rational action, all the elements and stages of which are penetrated by the thoughtful and agreed meanings of the actor; it involves a clear awareness of the goal, correlated with rationally meaningful means of achieving it. «That in-

dividual acts purposefully, – Weber supposes, – whose behavior is focused on the goal, means and side effects of his actions, who rationally consider the relationship of means to the goal and side results, and finally, the relationship of possible goals to each other, that is, in any case, not affectively (primarily not emotionally) and not traditionally» [3, p. 629]. The semantic conditionality of the goal by the motive, the consistency of the goal and the means of its achievement become the measure of the rational nature of the activity, and the purposeful activity itself acts as a supreme standard of rationality.

Weber deliberately arranged the four types of social action described above in order of increasing degree of rationality. This order, on the one hand, serves as a kind of methodological technique for explaining the different nature of the subjective motivation of an individual or group, without which one cannot speak about an action focused on others; he calls motivation «expectation»; without it, action cannot be regarded as social. On the other hand (and Weber was convinced of this), the rationalization of social action is at the same time a tendency in the historical process. And although this process proceeds not without difficulties, various obstacles and deviations, the European history of recent centuries, the involvement of other, non-European civilizations on the path of industrialization, according to Weber, testify that rationalization is a world-historical process. «One of the essential components of the rationalization of an action is the replacement of internal adherence to habitual mores and customs with a planned adaptation to considerations of interest. Of course, this process does not exhaust the concept of “rationalization” of the action, because the latter can proceed, moreover, positively – in the direction of conscious value rationalization – and negatively – not only due to the destruction of morals, but also due to the suppression of affective action and, finally, due to the suppression of value-rational behavior in favor of purely rational behavior, in which one no longer believes in value» [5, p. 558].

Max Weber upholds an individualistic approach to social action, understanding the latter as the result of the actions of individuals who are directed in relation to each other in a specific way. Such an action can be considered either as a set of means used to achieve certain practical goals, or as the realization of certain final values, or as a combination of one and the other. Action must be understood in the meaning that is assigned to it by individuals. Society is a collection of active individuals, each of whom strives to achieve their own goals. Rationalization acts as a form of development, or social progress, which is carried out within the framework of a certain pictures of the world, which are different in history.

Weber identifies the three most general types, three ways of relating to the world, in which the corresponding attitudes or vectors (directions) of people's life activity and their social action are enclosed. The first of them is connected with Confucianism and Daoism religious and philosophical views, which have spread in China; the second is connected with Hindu and Buddhist ideas, common in India; the third – with the Jewish and Christian images, which originated

in the Middle East and then spread in Europe and America. Weber defines the first type as an adaptation to the world, the second as an escape from the world, and the third as a mastering of the world. The directions of subsequent rationalization are given by these different types of attitude and lifestyle, which determines the direction of the various ways of historical development.

Rationalization for Weber appears as the fate of Western civilization and of humanity as a whole. The growing role of the purposeful action from the point of view of the structure of society as a whole means a rationalization of the way of managing the economy: rationalized management in all areas of social life (in the field of economics, politics, science, culture) rationalized the way of thinking of people, as well as the way they feel and the way of life in general. All this is accompanied by increasing the social role of science, which, according to Weber, is the purest embodiment of the principle of rationality. Science penetrates primarily in production, and then in management, and finally, also in everyday life – in this, Weber sees one of the evidence of the universal rationalization of modern society.

Rationalization, according to Weber, is the result of a combination of a number of historical factors that predetermined the direction of development of Europe over the past 300–400 years. This is not something predetermined, but also not the result of a simple set of circumstances. It so happened that at a certain time period in a certain region of the world several phenomena met that carried a rational beginning: ancient science (especially mathematics, supplemented by the Renaissance experiment and later acquired the character of experimental science, internally related to technology); rational Roman law, which the former types of society did not know and which received its further development in Europe during the Middle Ages; a rational way of farming, arising from the separation of labor from the means of production (the emergence of «abstract labor», accessible to quantitative measurement) [1, p. 23].

In Weber's terms, the factor that made it possible to synthesize all these elements turned out to be Protestantism, which created ideological preconditions for implementing a rational way of managing the economy (primarily for introducing the achievements of science into the economy and turning it into a direct productive force), since economic success was elevated by Protestant ethics to a religious vocation. As a result, a new type of society (never before existing, and therefore having no analogues in history) appeared in Europe for the first time – industrial.

Weber calls all pre-existing types of societies, unlike contemporary ones, traditional, the most important sign of which is the lack of dominance of a formal-rational beginning in them. The concept of «traditional society» covers a huge historical era – from a patriarchal clan society with a dominant mythological formation to the end of the feudal period, which was characterized by the dominance of subsistence farming, the division of society into estates with sufficiently strict privileges (including legal), inter-divisions, monarchical hereditary power.

Weber considered the behavior of the individual in the economic sphere to be the purest empirical model of the purposeful action. It is no coincidence that he usually gives examples of purposeful action from this sphere (exchange of goods, competition in the market, stock exchange game, etc.). Accordingly, when it comes to traditional societies, he notes that the purposeful type of action there occurs mainly in the economic sphere. Thus the question of the historical fate of capitalism was predestined by both Weber's methodological individualism and his understanding of social action.

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