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A Comparative Study of Max Weber and Werner Sombart's Method and Theory on Theological Roots of Modern Capitalism

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Abstract

The purpose of this study is to implement a comparative approach to investigate the interplay between religion and the rise of capitalism through the perspectives of Max Weber and Werner Sombart. By contextualizing their positions within the intellectual debates of their time, this study highlights their respective inclinations towards the Austrian School and the German Historical School. Weber's Neo-Kantian influences and Sombart's Hegelian roots further deepen the philosophical and epistemological divide between them. In the next step, the methodology and theories regarding the spirit of modern capitalism, religious motivation, and the future of capitalism are reflected. Weber's work, *The Protestant Ethic and the Spirit of Capitalism*, posits that Protestant ethics played a crucial role in the development of modern capitalism, emphasizing rationalization and ethical discipline. In contrast, Sombart's works, including *Der Moderne Kapitalismus* and *Jews and Modern Economic Life*, argue for a broader array of influences, integrating psychological, social, and cultural factors in shaping capitalist behavior and especially emphasizing the role of Judaism. The research underscores their contrasting views: Weber sees capitalism and Protestant ethics as singular phenomena with an elective affinity, while Sombart views capitalism as the manifestation of a modern capitalist spirit (Geist) influencing psychological incentives and broader social needs.

Keywords: Capitalism, Spirit, Ideal Types, Neo-Kantians, Historicism, Protestantism, Jewish Ethics.

Introduction

The interplay between religion and the rise of capitalism has long been a subject of scholarly debate, with seminal works by thinkers such as Max Weber (1864-1920) and Werner Sombart (1863-1941) providing foundational perspectives. Weber's *The Protestant Ethic and the Spirit of Capitalism* posits that Protestant ethics played a crucial role in the development of

modern capitalism. Contrarily, Sombart's works, including *Der Moderne Kapitalismus* and *Jews and Modern Economic Life*, argue for a broader array of influences, including religious, social, and psychological factors, shaping capitalist behavior. Concerning religious factors, Sombart indicated that all of Weber's arguments about the role of Protestant ethics can also be observed in Jewish ethics.

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Both thinkers were in charge of *Archive*, an influential magazine of their time, in the early 20th century. Sombart, who was much more famous than Weber, often referred respectfully to Weber; for instance, in his second edition of *Der Moderne Kapitalismus*, he mentioned Weber and credited him for methodological advice (Sombart, 1902). Despite the fame and honors bestowed upon him in his home country, Sombart is now an almost forgotten figure in English-speaking academic circles. This might be due to his book on Jews, which was misunderstood as an anti-Semitic work. Sombart refuted that accusation, claiming his work gave a noble and scientific account of the role of Jews. He may also be forgotten due to his support of the Nazis or because of the rich historical details in his work (Grundmann & Stehr, 2001). Nevertheless, his contributions are worth reexamining, especially in comparison to Weber's, which would enhance our understanding of both thinkers.

The primary object of this research is to conduct an in-depth analysis of the philosophical inclinations of these thinkers to explore how these inclinations have influenced and shaped their theories and to highlight their common viewpoints and gaps. By thoroughly examining their philosophical perspectives, we can gain a clearer and more comprehensive understanding of their contributions to their respective fields. The significance of this work is to eliminate ambiguities and misunderstandings when interpreting their ideas and theories. By doing so, we can appreciate the full depth and context of their intellectual legacies, ensuring that their work is accurately represented and understood after a century.

The literature on Weber and Sombart can be categorized into methodological studies and comparative analyses. Methodological studies include works that explore the philosophical foundations and methodologies of each thinker. For instance, Eliaeson discusses Weber's philosophical foundation and his influences from Rickert and the Neo-Kantians (Eliaeson, 1990). Gioia examines Sombart's significant work *Jews and Modern Economic Life* and its neglect due to his support for Nazism (Gioia, 2015), while another researcher provides a new narrative on Jews and their wealth accumulation (Cassen, 2020). Sombart's expansion of his concept of sociology is also notable (Sombart, 1949). Regarding Weber, Etzrodt analyses the *Protestant Ethic* and its relation to Adam Smith (Etzrodt, 2008), and explores the commonalities and differences between Weber and Habermas (Etzrodt, 2009). Additionally, a paper critically reviews the concept of rationality in Weber's work (Yermolenko, 2021), and Sadri presents the influences of NeoKantians on Weber (Sadri, 1987).

Comparative analyses, on the other hand, focus on the writings that compare and contrast Weber and Sombart. Parsons introduces Weber's ideas and his debate with Sombart to the United States of America (Parsons, 1928), while Longo examines Parsons's role in marginalizing Sombart (Longo, 2015). This topic is also explored in (Adair-Toteff, 2021). Weber himself discusses the dialogue between Weber and Sombart on technology and culture (Weber, 2005). Loader focuses on the concept of transvaluation, rooted in Nietzsche's philosophy, and examines the contrast between the two (Loader, 2001). A research addresses historical materialism in the views of Engels, Weber, and Sombart (Hilferding, 1903).

Haber examines the debate from today's perspective, identifying what sustains capitalism today and its relation to Weber and Sombart's thoughts (Haber, 2017). Raphael explores the concept of understanding (*Verstehen*) that passed from Dilthey to Weber and Sombart (Raphael, 1990), and Adair-Toteff reports on the first conference of the German Society for Sociology in 1910 (Adair-Toteff, 2005).

This paper is divided into two main sections. First, we will delve into the philosophical bases of their methodologies by contextualizing their positions in the intellectual controversies of their time. After distinguishing their similarities and divergences, we will further trace the philosophical schools that influenced their ideas. In the second section, we will examine how their philosophical viewpoints and methodologies are reflected in their theories regarding modernity.

1. Methodology

In order to gain a comprehensive understanding beyond Weber and Sombart's theories, their methodological perspectives should be examined, and then the philosophical paradigms and intellectuals who shaped their approaches must be explored. As it is crucial to understand their works in dialogue with other schools of thought and heated debates on methods in cultural studies, here we also briefly look at the position that Weber and Sombart took and the critiques they received. Weber is known for the terms "interpretive sociology, value-relation¹, ideal types, and the spirit of capitalism," many of which can be observed in the works of Sombart as well. For instance, the famous term "spirit of capitalism" was formulated and used by Sombart two years before the publication of *The Protestant Ethic and the Spirit of Capitalism* (Sombart, 1902, p. 16). Subsequently, we will show to what extent they mean the same things by these terminologies by first briefly looking at the main concepts of their theories and then exploring these concepts in the following debates: 1. Methodesentireit 2. Neo-Kantian school vs. Hegel.

The starting point of Weber's methodology is the inquiry into the nature of social action and its various types. He defines social action as meaningful behavior directed towards or in response to the actions of others. Weber identifies four types of social action: traditional action, affectual action, value-rational action, and instrumentally rational action (Weber, 1978, pp. 24-29). Sombart, however, seeks the origins of social actions in motive, classifying them as following opposite pairs of action:

1. Autonomous-heteronomous action; heteronomous is all action under the will of another: for example, of the worker in a capitalist company;
2. Traditional-rational action;
3. Value-rational-instrumental-rational action; purposive-rational action, in turn, can serve purposes of a lower or higher order: the entrepreneur can produce: to manufacture material goods, to earn money thereby, to achieve this or that purpose with the money earned. (Sombart, 1930, p. 467)

Regarding cultural science, various intellectuals have used the "interpretive" method to oppose positivism in cultural science; namely neo-idealist Wilhelm Dilthey (1833-1911) who argued that cultural science objects require different

¹ Wertbeziehung

methods from natural science, and neo-Kantian Heinrich Rickert (1863-1936) who emphasized the specificity of cultural science and its unique methodological basis. Weber neither seeks to eliminate values in the research process (like positivists) nor aims to eliminate the objectivity of science (like cultural studies or post-modern debates). Instead, he wants to have a "cultural science" and also recognize values. The fundamental issue now is how it is possible to combine these two (Weber, 2011, p. 280). Similarly, Sombart advocates for using different methods in cultural science, especially in economics, where he developed the interpretive method (Sombart, 1930, p. 398). Given that "action" is a pivotal element in the frameworks of both thinkers, it is crucial to choose a method capable of revealing and interpreting their respective meanings.

To better understand this method and the similarities and differences between these two thinkers, first, we should delve into the philosophical foundations of meaning for both. Secondly, to elaborate on the epistemological sphere, it is necessary to explore the relationship between our understanding of the meaning of human action and the truth (as it is). Finally, the role of values in our comprehension and description of cultural phenomena should be examined. In the examination of meaning, according to Weber, one can easily hear the Kantian resonance. What Weber considers the subject of cultural sciences is not a unified and law-based reality throughout history (as in natural sciences), but the meaning of phenomena in their historical individuality. Each phenomenon in any given era can have a unique meaning. In the context of cultural sciences, what is worth knowing is the cultural meaning, not causal explanations (Weber, 2011). Max Weber's interpretive sociology seeks to understand social action by focusing on the meanings individuals attach to their behavior. This approach emphasizes understanding the subjective meanings that actors ascribe to their actions, but it does not rely on "actual existing meaning" as the primary subject matter because attaining and verifying the actual existing meaning is too complex. Instead, interpretive sociology is mainly interested in "the theoretically conceived pure type of subjective meaning attributed to the hypothetical actor or actors" (Weber, 1978, p. 4). This is possible by using heuristic devices, one-sided accentuated constructs to analyze social phenomena, ideal types (Sadri, 1992, pp. 7-10).

Sombart also accepts this distinction when comparing the progress of natural sciences and humanities. He writes: "As Nietzsche has said, experiences in natural sciences are investments; in these fields, we know more today than yesterday, and tomorrow we will know more than today. However, in cultural sciences, such progress cannot be spoken of because their subjects constantly change, as does the observer's perspective. It is nonsense to think that we know more about economic relations like Hume's theory on money today than we did in 1750" (Sombart, 1930, p. 632).

In this case, the question arises as to how it is possible to establish a foundation for science in the realm of cultural phenomena from among these countless subjective perspectives. In this sense, Weber cultivates an irrational gap between concept and reality:

"An era that has tasted the fruit of the tree of knowledge (Kant's philosophy) is doomed to know that it cannot derive the meaning of the world based on the results of the analysis of the world, even the most complete analysis of the world, but must create this

meaning itself" (Weber, 2011, p. 106).

Weber's effort to bridge this gap and somehow save the cultural sciences is remarkable. He considers values as a criterion for selection among the countless. "Understanding cultural phenomena is only possible based on the significance as well as the meaning of the concrete systems of reality in each individual situation. However, no law shows us in which situations and to what extent this importance and meaning apply. Therefore, answering this question is only possible based on value ideas, ideas through which culture is always viewed" (Weber, 2011, p. 21). It should be noted that fundamental value refers to the absolute sense of value, not absolute value. No specific value or value content in cultural sciences will be absolute and universal; rather, value is merely a form of universal orientation. In other words, "Weber's cultural analysis of the meaning of human action is within a perspective that is value-laden but devoid of universal value judgments" (McCarthy, 2003, p. 102).

Sombart, in the fifteenth chapter of his methodology book, which is dedicated to laws in cultural sciences, humbly writes: "Max Weber has done our science a great service by revealing the meaning of this kind of regularity and laws. His investigations are conclusive. We can do nothing but reflect on his ideas and will only have to adopt his terminology. Here too, Max Weber speaks of 'ideal types' and 'ideal-typical conceptual formations', although these are certainly not 'types', but rather 'ideal' constructions of a completely different nature" (Sombart, 1930, p. 450). Sombart praises Weber's famous conceptual tool, the "ideal type." It is something that fundamentally makes the science of sociology possible because Weber considers all theoretical concepts in sociology to be "ideal" (Weber, 1978, p. 47).

In fact, the ideal type is a logical construct that makes comparative sciences possible. According to Weber, the "ideal type" is "a conceptual construct that neither has historical reality nor empirical reality" (Weber, 2011, p. 145). Thomas Burger explains three interrelated aspects of the "ideal type": 1) Logical, 2) Content-related, and 3) Functional.

- **Logical Aspect:** The "ideal type" is an abstract concept derived from multiple complex phenomena, which, although they differ empirically in degree, are organized under a single concept. The main issue here is the logical relationship between the content of the ideal type and empirical reality, whether, from a logical-epistemological standpoint, the ideal type can represent empirical reality.

- **Content-Related Aspect:** The "ideal type" explains specific kinds of norms and schemes that individuals use to make decisions in particular situations. Various actions and thoughts also stem from these decisions.

- **Functional Aspect:** The "ideal type" is an exploratory research tool through which specific empirical cases are discovered (Burger, 1976).

Despite Sombart's admiration for Weber and his presentation of this conceptual tool, some commentators believe that Sombart himself used this concept differently. The conceptual tool used by Sombart, according to Spiethoff, is a "real type," which "originates in the mental process of separating recurring social phenomena from their unique particulars and reflects a specific pattern of economic life and embodies its essential properties" (Spiethoff, 1953).

Up to this point, as we have seen, there are significant convergences between these two thinkers. Yet, this is not the whole story, to see the other side of the matter, we must clarify

their positions in the following controversies:

1.1. Methodentritt

The Methodenstreit, or "method dispute," refers to a significant debate in the late 19th century within the field of economics, primarily between the historical school, represented by Gustav Schmoller (1837-1917), and the Austrian school, represented by Carl Menger (1840-1921). This dispute revolved around the appropriate methodologies for studying economic phenomena and the nature of economic theory itself. At the core of the Methodenstreit was the conflict between the empirical, inductive approach of the historical school and the abstract, deductive method of the Austrian school. Schmoller and his followers emphasized the importance of historical context and empirical data in understanding economic behavior, arguing that economics should be studied as a social science that considers the complexities of human behavior and societal influences.

(Božilović, 2017). In contrast, Menger advocated for a more theoretical approach, focusing on the principles of individual decision-making and the subjective nature of value, which he believed could be derived from logical deduction rather than historical analysis (Louzek, 2011).

Given that one of the key contexts for Weber and Sombart's methodological emergence is the historicist dominance in German cultural life. Schumpeter noted that at the turn of the century, there were scarcely more than a few German social scientists who did not adhere to historicism (Schumpeter, 1914). In the definition of the late Nicos Poulantzas (1936-1979) historicism is associated with the presence of a so-called central subject as a formative force in history, be it in the form of the acting political class, as in the case of Antonio Gramsci (1891-1937), or the World Spirit moving through the stages of history in changing incarnations, as in the case of Hegel (1770-1831). The somewhat eccentric definition by Karl Popper (1902-1994) from *The Poverty of Historicism* must be mentioned too. Here, historicism is connected with the search for eternal historical laws of a deterministic kind, as in the case of the above-mentioned Hegel (Sven, 1990). Therefore, as far as we are concerned, there are at least two interpretations of historicism. One is Meinecke's, which emphasizes the singularity of phenomena, and the other is influenced by Hegel and Marx, who seek unity beyond the singularities.

The latter interpretation is exactly the subject of one of Weber's strongest criticisms of historicism. According to him, in his book on *Roscher and Knies* (who were part of the younger generation of this school), this school fell into the trap of Hegelian absolutism, which claims that "the laws of history" are manifested in the "material world" (Weber, 1975). Thus, while the historical school correctly sought to elucidate the contingent and conditional aspects of economic life (in opposition to the natural law model of Menger and classical economics), Weber could not sympathize with the supporters of this school due to its astonishing blend of Hegelian "absolute rationalism" and Marxian "materialist conception". Weber did not maintain the laws of history as propounded by either Hegel or Marx. His attack on Hegel was driven by his Kantian inclinations and the fact that scientific tools can not completely reveal the reality of history or fundamental reality (Weber, 2011; Huff, 2009). An example of this criticism is the recurrence of the concept of *Volk* (meaning "people" or "nation") as instinctive forces that stand above history and, at the same time, drive it (Weber, 2011, p. 202).

Considering Weber's Kantian inclinations, his criticism of the Austrian School of Theory is also easily understandable. He regarded 'laws' as 'forms' of reality that cannot objectively provide us with the 'content' of reality (Huff, 2009, p. 82). In contrast to Weber, Sombart, who is considered a member of the younger generation of the historical school (Betz, 1971), bases his criticism of this school on emphasizing the singularity of phenomena and the lack of totality beyond these phenomena:

The "historical sense" they [historicists] aimed to cultivate, which manifests in the "love of the individual" and the "positive understanding of the world in its diversity and variety," is ultimately unscientific. Science, as Goethe noted, entails "tearing the particular into general categories," and even historiography cannot be scientifically pursued without these general categories. This unscientific historicism likely stems from Romanticism, with its roots in irrationalism (Sombart, 1930, p. 292).

Sombart, in the first edition of his book *Modern Kapitalismus*, used Kant's famous motto to emphasize the simultaneous need for fact and theory in explaining the origins of capitalism. This quote from Kant's *Critique of Pure Reason* has a renowned history. A translation might read: "Thoughts without content are empty, sensations without concepts are blind" (Sombart, 1902; Kant, 1976).

While this Kantian motto sheds light on his stance towards the Austrian School of Theory and the branch of the historical school that does not seek any theory beyond historical individuality, it also provides a sharper critique of the pioneers of this school, Gustav Schmoller and Adolph Wagner (1835-1917). As much as he was indebted to these two "Chair Socialists," Sombart complained that they did not invest enough time and energy in studying history. While there is no doubt that both professors belonged to the German Historical School of Economics and had objected to the theoretical emphasis of the Austrian School of Economics, they did not explore historical epochs. Sombart strives to connect the historical aspects of the German school with the theoretical tendencies of the Austrian school into a "higher unity" (Adair-Toteff, 2024, p. 17).

Up to this point, we have seen that neither Weber nor Sombart fully accepted the foundations of either school, each having different criticisms. While Sombart criticized the search for unity beyond history, Weber criticized the lack of such an approach. Just as their bases for criticism were different, as we shall see, their solutions to this dichotomy also stem from entirely opposing principles.

1.2. Neo-Kantians vs. Hegel

In the previous section, we observed the beginning of the divergence between Weber and Sombart. In this section, we will see how their approaches to methodological issues deepen the gap between these two thinkers. Since Neo-Kantian is a term that applies to a large number of German philosophers, it is important to note that the reference here is to the Southwestern Neo-Kantians, particularly Wilhelm Windelband (1848-1915) and Heinrich Rickert, whose ideas significantly influenced Weber's thought. The work of this school involves a return to Kant and an emphasis on the "forms of intuition" and "categories of understanding" as a basis for the humanities. This school opposes any metaphysical analysis of reality, advocating instead for a realist epistemology.

Weber's critique is based on the idea that this group fails to understand the irrational gap between reality and concept. This means that providing a comprehensive description of reality is impossible, as reality is an infinite complexity of qualitative distinctions, and there is no standard for the completeness of our descriptions. Those representatives of the historical school who believed that reality could be deduced from the laws of historical development, namely Stemler, were inherently Hegelian and simply wrong, meaning they believed in an expressive metaphysics and a unity beyond history that is knowable (Oakes, 1990, p. 45).

Returning to Sombart, it is appropriate first to consider his critique of Windelband and the southwestern school and then examine the efforts of Menger and the theoretical school from his perspective, and finally review his solution. The dichotomy put forward by Windelband distinguishes between two types of scientific inquiry: nomothetic and idiographic. In essence, the nomothetic approach seeks to generalize and find universal laws, while the idiographic approach aims to understand the particular and unique aspects of individual cases. This dichotomy highlights the essential differing methodologies and objectives of natural sciences compared to historical and cultural sciences. According to Sombart, this contrast is incorrect in all interpretations given to it. 'Natural science and history' do not form a meaningful opposition. It should always be stated as natural science and historical science. While this distinction has been advantageous in some respects, the meaning attributed to it did not make sense (Sombart, 1930, p. 293).

Sombart's argument is based on his methodological pluralism, the idea that there is no need to make a fundamental methodological distinction between natural and cultural sciences. Both nomothetic (law-based) and idiographic (descriptive) methods can be applied in both fields. To mention his examples, a national economist discussing banking deals with the general, while an astronomer observing solar prominences or a geographer describing the eruptions of Vesuvius deals with the individual. In his perspective, the dichotomy presented by this school was extremely dangerous because it forced scholars to choose between the two options:

Carl Menger wanted to prove that the nomothetic (natural scientific) approach was not only permissible but also necessary in the cultural sciences. From his standpoint, this was entirely justified. Because if there is only the choice between nomothesis and idiography, and one does not want to completely surrender national economics to idiography, the only option left is to construct it according to the nomothetic method ... [on the other hand] The representatives of the historical school wanted to cultivate "historical sense", which manifests in the "love for the individual" and the "positive understanding of the world in its diversity and variety," is [similarly] ultimately unscientific (Sombart, 1930, p. 295).

Here, Sombart proposes a third method that reveals his Hegelian tendencies. Interestingly, to develop his theory, he starts with Stammler's concepts—the very person whom Weber criticized for having Hegelian tendencies.

The very correct and important core idea of Stammler's book, which I have already praised as one of the groundbreaking works of the new spiritual science direction, is that all human actions in society are based on an 'order', meaning they are regulated

actions ... Stammler justifies his view by pointing to the 'ordered' nature of human actions. This always follows a specific order, and every order is directed toward a goal, this again towards a higher goal, and so forth until we reach the highest goal, which according to Stammler is 'the society of free-willing individuals' (Sombart, 1930, p. 296).

Here, one can easily trace the Hegelian, and even Marxian dialectic, which are reflected in his works. For instance, Naumann explained that Sombart's book *Der moderne Kapitalismus* is reminiscent of Hegel's philosophy of history rather than Marx's ideal of the future (Adair-Toteff, 2024, p. 59).

Sombart argues against Engels's view by stating that tracing back the causes of events would lead to an infinite regress, making it impossible to determine the "ultimate" cause with certainty. He asserts that delving beyond human motives is fundamentally inadmissible as it would abandon any possibility of understanding. The principle that human motives are the ultimate causes of all cultural events is foundational to cultural science, and these motives, he emphasizes, are free (Sombart, 1930, p. 425). In the first edition of *Der Moderne Kapitalismus*, Sombart asserts that methodological explanations, especially for historical epochs, require a unifying concept or principle derived from human motivation (Sombart, 1902, p. xiii). Sombart's argument sharply contrasts with Engels', who downplayed the significance of individual motives, focusing instead on the underlying historical causes that shape these motives. Engels (1820-1895) emphasized investigating deeper forces behind apparent motives, while Sombart argued that human motives are the ultimate causes of cultural events and cannot be traced back further without losing the essence of understanding. He considers this principle as fundamental to cultural science, asserting that these motives are rooted in freedom.

To understand these motivations that are essential for sciences, we return to the concept of *Verstehen*. The method Werner Sombart is trying to develop can be described in brief as the interplay between unities and peculiarities. However, Sombart refutes the idea that this method is metaphysical. Indeed, he adds, understanding is not metaphysics as long as it moves within the realm of subjective and objective spirit, both of which are accessible through experience and verifiable. This form of understanding involves identifying the meaning of relationships within these realms. *Verstehen* "transcends" when it leaves the realm of subjective and objective spirit and enters the realm of "absolute" spirit; that is, it strives to grasp not the immanent meaning of culture in its empirically given state, but the transcendent meaning of culture. This method remains scientific as it interconnects the singular phenomena within general rules, which are categorized into three kinds of *Verstehen*:

a) Understanding of Meaning (*Sinnverstehen*):

This involves the cognitive act of grasping the timeless nature of historical (cultural) phenomena. It includes understanding the ideas used to construct the national economic system in their conceptual purity and functional significance as well as the possible components of the economic system.

b) Understanding of Matters (*Sachverstehen*):

This focuses on understanding actual economic activities within their historical context, emphasizing the importance of the objectified spirit and materialized essence in economic

systems over time. It deals with classifying actions and motives into relevant contexts of meaning and recognizing the historical nature of psychological categories in national economics. c) Understanding of the Soul (Seelverstehen):

This type involves gaining insight into the mental and emotional motivations behind human actions. It emphasizes understanding the subjective and spiritual dimensions of economic behavior and the role of human motives as driving forces behind cultural events (Sombart, 1930, p. 358). Therefore, understanding is possible because the objective Geist (the pure meaning of modernity) obeys the same laws as our personal subjective soul. The unity that transcends these three parts of his methodology forms the foundation of his theory and is reminiscent of Hegelian philosophy and terminology. Sombart himself also praises this method, but he regards only abstract concepts as insufficient for explaining capitalism (Sombart, 1902, pp. 3-7).

In addition to his explanations about the methodology, one can observe a constant back-and-forth between abstract matters, temporal matters, and individual motives throughout his works. Furthermore, his books frequently feature numerous typifications of various social phenomena: types of social groups, types of social actions, types of production methods, types of businesses, types of economic systems, types of capitalism, types of socialism, types of nationalism, etc. All these classifications are based on linking abstract, transhistorical matters and categorizing them according to individual motives.

There are undeniable similarities between this method and what Alfred Schutz later proposed. According to Schutz, *The Phenomenology of the Social World* focuses on how we build typifications of other people, classifying them into types with specific qualities from which typical behaviors can be anticipated. This process forms our common-sense, taken-for-granted knowledge about the social world, guiding our daily actions.

We have general knowledge about human beings that distinguishes them from animals and plants. Additionally, we possess knowledge about specific types of humans – such as men, women, and different ethnic groups – that allows us to differentiate between them. As we move beyond these broad categories, we develop typifications for family and friends, with closer relationships yielding more specific expectations. However, no matter how close the relationship, it is fundamentally based on typification (Benton & Criebe, 2011, p. 84).

We hope that this essay will contribute to a better understanding of the similarities and differences between these two thinkers, particularly regarding the terms understanding (Verstehen), ideal type, the irrational gap between reality and concept, and the relationship between totality and individuality in cultural sciences. In the broadest sense, one could suggest that Weber's intellectual foundation is based on the individuality of phenomena, while Sombart's is based on a unity beyond the phenomena. Max Weber's fundamental critique of this perspective—particularly evident in his critique of Marx—was the elevation of specific matters to a holistic view and the reduction of multi-causal factors in cultural phenomena to single-cause explanations. In the following sections, we will shed light on how these philosophical foundations have influenced their theoretical framework

2. Modernity

Weber and Sombart considered modernity as a period distinct from previous historical eras, impacted by transformations in cultural, social, and economic attitudes. However, to better understand how modernity emerged according to them, we need to briefly look at their philosophy of history. As one might guess, Weber's aversion to transhistorical unity prevents him from viewing history as a single linear evolutionary process. "So far, the continuum of European culture has seen neither complete cyclical movements nor a specific unidirectional linear development (Weber & Weber, 1926, p. 75).

Sombart, on the other hand, believes, "History and development never follow a 'completely' linear path, as opposing tendencies occasionally divert the course of development. Only in general terms can we speak of a fundamentally uniform and linear development, which is influenced by the spirit and its representation of our era" (Sombart, 1967, p. 60).

2.1. The Spirit of Modern Capitalism

Despite Weber's critique of unifying interpretations and his emphasis on multiple historical factors in explaining cultural phenomena, he views modern capitalism as a unit that increasingly absorbs individual autonomy. The unit is seen as a configuration of institutions, which by the logic of their own requirements, increasingly narrow the range of effective choices open to men. However, unlike Marx's explanation, this unit is not an indivisible whole that can be equated with an

"acquisitive instinct" or a "pecuniary society". The further back Weber goes historically, the more he is willing to see capitalism as one feature of a historical situation; that is, the more he approaches modern industrial capitalism, the more willing he is to see capitalism as a pervasive and unifying affair. High capitalism absorbs other institutions into its image, and numerous institutional crisscrosses give way to a set of parallel forces heading in the same direction. This direction is toward the rationalization of all spheres of life (Gerth & Mills, 1946, p. 66).

To better illustrate this unit or the "spirit of capitalism," Weber uses the ethical recommendations of Benjamin Franklin. These recommendations are as follows: money should not be kept idle but should be invested in the economic cycle to make a profit, and one should be fair and reliable in dealings since personal credibility is essential for transactions, excessive consumption, and the purchase of luxury goods should be avoided as they hinder the circulation of money; and after effort and frugality, nothing is more valuable than punctuality and honesty (Weber, 2007, p. 60).

Sombart's view of capitalism as a unique phenomenon requiring distinct ethics aligns with Weber's perspective. For example, he differentiates the capitalist system from previous systems as follows: "The craftsman was relatively indifferent to competition; the modern capitalist was focused on minimizing if not eliminating it, the feudal craftsman focused on his handiwork and cared little about any income, the entrepreneur has little concern about his products because his single focus is on the accumulation of money, the craftsman was proud of his skills; the capitalist used his means toward the ends. Rationality, calculability, and marketing were simply means to more profit" (Adair-Toteff, 2024, p. 9). Additionally, he considers the need for a new legal system that guarantees private property, industrial freedom, and a competitive system as components of capitalism (Sombart, 1902, p. 28).

Sombart identified two distinct mentalities within the capitalist framework: the "burgher mentality" and the "entrepreneurial mentality." The burgher mentality is characterized by a focus on stability, security, and the accumulation of wealth through prudent management, while the entrepreneurial mentality emphasizes risk-taking, innovation, and the pursuit of new opportunities. This duality reflects the diverse motivations and behaviors that coexist within capitalist societies, influencing how individuals and groups engage in economic activities (Graça, 2023). This dichotomy was later reflected in Sombart's works, including *Traders and Heroes*, which he wrote to distinguish between German and English ethics (Sombart, 2021).

What distinguishes modern capitalism from its earlier forms is the nature of mental choice, either traditional or rational. This means whether the tools used are chosen simply due to historical precedent or are continuously reviewed and critiqued (Peukert, 2012, p. 543). His "concept of capitalism" contains three factors, namely form, spirit, and action. The form is private and includes the owner of the means of production, the production leader, and the worker. The spirit is the desire for profit and has the means of rationalization, while the action is through modernity. Sombart maintains that capitalism is founded upon three key ideas: the idea of profit, which is the overwhelming motive; the idea of competition, which is limitless; and the idea of rationalism, which is three-fold: it is planned, it is purposeful, and it is calculable technology (Sombart, 1925, pp. 3-9). He regards the concept of spirit as the most significant factor among those discussed, warranting a closer examination.

A more detailed explanation of Sombart's concept of spirit can be found in his last work (Sombart, 1938). Spirit manifests in religion, politics, family, economy, language, moral, and aesthetic norms (Sombart, 1938, pp. 17-21). Therefore, society is constituted by culture, which is seen as the symbolic meaning of systems (Sombart, 1938, pp. 68-77). The spirit liberates humans, placing the responsibility for their actions on them (Sombart, 1938, p. 288), but simultaneously exposes them to spiritual danger (Sombart, 1938, p. 52). It removes humans from the realm of nature. In these lines, one can perceive his opposition to materialist trends and the empirical methods of science as he adds that there is always a close relationship between the conception of man and scientific methods (Sombart, 1938, p. 109). Sombart views the anthropology of physical-chemical materialism and organic Darwinism as forms of animalism that lack the concept of spirit and are mere deviations (Sombart, 1938, p. 286).

Although he does not provide a specific definition of spirit and its origin (whether God, nature, or humans), he distinguishes between the general spirit (*Geist*) and the personal spirit, seeing human existence as a struggle between personal spirit and natural state. However, this balance has been disrupted by modern capitalism and economic rationality, leading Sombart towards cultural criticism (Sombart, 1938, pp. 324-339).

Based on these considerations and the philosophical foundations traced in Sombart's thought, it can be argued that Sombart's concept of the spirit of capitalism fundamentally differs from Weber's secular interpretation. Sombart views the spirit of capitalism not merely as an ideal type constructed for the study of societies but as the manifestation of the capitalist era as one of the cyclical stages of history. In his book *Modern Capitalism*, he attempts to link the purely abstract meaning of

capitalist rules with historically and contextually specific capitalist systems. In the next section, the role of individual motives will be discussed.

2.2. Religious Motivations

Before explaining Weber's issue, it is essential to address a frequently misunderstood aspect of his theory. According to Weber, the relationship between Protestant ethics and modern capitalism is neither reflective nor a manifest, causal or sufficient condition. It has been understood as the process by which two cultural forms—such as religious, intellectual, political, or economic—enter into a relationship of mutual attraction and influence based on significant analogies or affinities of meaning (McKinnon, 2010).

Additionally, Weber's entire theory emphasizes the independent realm of ideas, a thesis formulated in opposition to Marx's historical materialism, which completely negated the role of ideas and considered only material relations to be influential in the formation of these ideas. However, Weber does not intend to replace Marx's thesis with a completely contrary theory. He acknowledges the role of interests in shaping individual behavior but evaluates ideas, especially the religious ones, as having the potential to act as a railroad switchman under specific historical conditions, directing the course of action (Weber, 1922, p. 280).

Weber raises a subsidiary question about the extent to which religious forces can influence the expansion of capitalism. He explores the concept of calling (*Beruf*) and its implicit meaning. Before Weber, Marx introduced labor as an element of alienation in the modern world. However, Weber views the Puritans' regard for labor not as a negative aspect or even as a means to improve life circumstances but as a spiritual goal for salvation in the afterlife. The Reformation's concept of calling, differing between Lutherans and Catholics, emphasized religious and moral dimensions of worldly work more heavily. This emphasis peaks in Calvinism.

Weber's chain of reasoning is summarized as follows: According to Calvin, the first point is that only God is free, subject to no laws, and using worldly standards of justice regarding God's commands is meaningless and an insult to His greatness. The second point is that God's decrees are unchangeable. An exalted being beyond human comprehension has determined every individual's fate and organized the minutest details of the universe from eternity. The third point is that only some humans are saved while the rest are damned. Emotional and sentimental elements are ineffective in achieving salvation, and religious rites are not a means of obtaining grace. Grace is purely the product of an objective power and should not be attributed to an individual's worthiness. The next point is that those favored by God cannot lose that favor. Additionally, for those deprived of God's grace, there are no means of regaining it. This doctrine of predestination is the most crucial feature of Calvinism. These teachings put psychological pressure on believers, and the anxiety of the fear of damnation unconsciously promoted a personality type among believers that aligned with early capitalism. This personality type employs instrumental rationality aimed at goals, is punctual, does not spend its income on pleasure, and reinvests it in business. All of this was so that the believer could see their worldly success as a sign of salvation in the afterlife (Weber, 2007).

Sombart was praised by his mentor Schmoller for the historical details in his book *Modern Capitalism*. However, he

was criticized by Schmoller for ignoring the moral and social contexts in his explanation of modern capitalism. In his later works, Sombart attempted to address this shortcoming by exploring the psychological, social, and moral roots of capitalism (Schmoller, 1987, pp. 143-145).

In his book *Der Bourgeois*, Sombart regarded the innovations of the bourgeois class as a significant social factor. In *Luxury and Capitalism*, he delicately shows that the demand for luxury goods had a substantial impact on the emergence of capitalism, identifying the psychological factors of luxury goods proliferation as vanity and ostentation, and also the desire for social status and distinction. Sombart argues that the need for military forces, especially the navy, for more efficient and numerous armaments and warships led to the application of instrumental rationality on a large scale, resulting in capitalism. All these instances are manifestations of the spirit of capitalism throughout history, with capital accumulation and instrumental rationality being its key components (Adair-Toteff, 2024, p. 10). Weber also suggests that geopolitical competition between states (i.e., war) operates as a selection mechanism that eliminates weak systems of state organization (Weber, 1978, p. 972). However, it is quite clear that war was not a sufficient cause of bureaucratization (Gorski, 2005).

In addition to the non-religious motives mentioned, Sombart also emphasizes the role of religious motives. Two years before Weber, Sombart highlights Luther's role in removing the stigma from commerce and profit-making in Christianity as a factor in the rational calculation of traders to achieve accurate pricing (Sombart, 1902, pp. 175-177).

In his book *Jews and Modern Economic Life*, Sombart uses extensive data to show that the same ethics observed among Protestants were perhaps even more prominent among Jews. He pointed out that they had some traits similar to the Puritans: they were devoted to God, they were intent on fulfilling their earthly obligations, and they were concerned with rationality and calculations. Unlike Weber, who focuses most of his discussions on the doctrines and theologies of Christian sects in his work, Sombart's book primarily concentrates on the historical and social conditions of Jewish life in Europe from the sixteenth century onwards. He delves into economic hubs, the role of Jewish communities in the formation of new commercial centers and international trade, the reciprocal influences of colonies and new governments, and the objective conditions that led Jews to embrace modern capitalism. Only a relatively short section of his book is dedicated to religious teachings (Sombart, 2015).

Sombart viewed the social conditions of Jews as conducive to capitalist behavior. He considered factors such as the wide dispersion of Jews, their status as outsiders and second-class citizens, and their wealth as enabling Jews to expand their businesses internationally, adapt to new conditions, and thus facilitate the emergence of modern capitalism. In the next step, he shows the importance of religion in the economic life of Jews, arguing that Jews are more aware of and committed to their religious teachings than any other ethnic group. Among Jews, the wealthiest were often the most knowledgeable about Torah and Talmudic teachings. He then claims that the nature of Judaism and capitalism share a common spirit. This shared characteristic can be summarized in one word: rationality. Both are opposed to mysticism and emotional, passionate behaviors (Sombart, 2015, p. 201).

Judaism is unfamiliar with mysticism and intuition that considers the seeker as one with God, viewing such

approaches with disdain. The structured legal rules between God and the Jews also influenced their relationship with capitalism. The entire Jewish religious system is essentially a covenant between God and the Jewish people, with both parties obligated to adhere to specific standards. Acts of charity and personal sins are weighed against each other, with rewards or punishments corresponding to the heavier side. Thus, Jews always strive to keep their deeds in check (Sombart, 2015, p. 217).

Greed is one of the prohibitions in the Ten Commandments, and Jews believe that the pursuit of wealth is merely a means to please God, not for personal consumption. One synagogue practice was auctioning off the reading of the Torah to the highest bidder, who would then be blessed by it. Jewish religious literature sometimes praises poverty over wealth but also often regards wealth as a sign of divine favor and a source of happiness alongside health. Wealth accumulation is never condemned. He then discusses wealth in Jewish literature extensively, firmly maintaining his position. The outcome of these beliefs is that denying the world and otherworldly asceticism in Judaism cannot lead to salvation (Sombart, 2015, p. 222).

Accordingly, the difference in interpretation between Weber and Sombart lies in their views on the relationship between Protestantism and capitalism. Weber saw Protestantism and capitalism as two individual historical phenomena with a mutual attraction, whereas Sombart viewed capitalism as the manifestation of the spirit of capitalism in history, influenced by various factors in individual motivations, such as the desire for ostentation, Protestant ethics, and Jewish ethics.

2.3. The Future of Capitalism

Weber views human life during the dominance of rational mechanisms and bureaucracies as devoid of meaning, referring to this phenomenon as the iron cage. He argues that while bureaucracy is necessary for the efficient functioning of modern societies, it also results in a loss of personal autonomy and creativity. Individuals become cogs in a machine, bound by rules and regulations that dictate their actions and limit their freedom (Baehr, 2001).

Years before Weber, Nietzsche had said to overcome rational Enlightenment: "A new breed of philosophers must arise, with such noble and strong souls, to re-evaluate ancient values" (Nietzsche, 2006, p. 201). In the concluding passages of *The Protestant Ethic*, Weber echoes a similar sentiment, stating that capitalism produces "specialists without spirit and experts without heart." To escape this cage, either new prophets must emerge or ancient values must be reinterpreted.

Starting with the second edition (1916) of *Der Moderne Kapitalismus*, Sombart's economic history integrates the concept of an economic system. This is broken down into three elements: the spirit, the form (or order), and the technique. The spirit remains the primary aspect of the economic process. Subjectively, the spirit of economic society is connected to the goals associated with economic activities, the intensity or passion with which they are pursued, and the norms that may be linked to these activities. However, when these activities become institutionalized and their goals are rationalized and externalized through business organization techniques and technical aids in accounting and calculation, the economic spirit takes on a distinctly objective aspect. This is especially evident in large business enterprises, which Sombart views as

epitomizing the spirit of capitalism (Rogin, 1941).

Regarding the future of capitalism, Sombart diverges from Marx. Despite his anti-capitalist stance, Marx remained a cultural optimist, viewing capitalism as a necessary stage in the dialectical process leading to socialism and, eventually, communism. Despite this, Sombart does not see himself as a cultural pessimist as much as Weber did. Instead, he believes that any optimism must come from a possible re-establishment of pre-capitalist life patterns, with medieval seigneurialism being his ideal (Sombart, 1902, pp. xx-xxi).

Conclusion

This research aimed to elucidate the positions of Max Weber and Werner Sombart within their historical context, particularly about academic debates such as the Methodenstreit (debate on methods). If we envision a spectrum with the German Historical School on the left and the Austrian School of Economic Theory on the right, Weber leans towards the right, while Sombart leans towards the left. Each thinker, based on their position on this spectrum, sought to construct conceptual and methodological tools to explain cultural phenomena without compromising the scientific validity of their explanations.

As Weber's neo-Kantian inclinations and Sombart's Hegelian roots were identified, the intellectual divide between these two scholars deepened. Weber opposed all metaphysical explanations and the notion of a transhistorical or overarching unity, emphasizing the irrational gap between reality and concept. In contrast, Sombart endeavored to connect the purely transhistorical with particular historical specifics. For him, knowledge emerged from the dialectical movement between the particular and the universal. This interplay between the particular and the universal, along with the numerous classifications of social phenomena in Sombart's works, is similar to Alfred Schütz's phenomenological method, which was formulated years after Sombart.

These philosophical differences manifested in their interpretations of capitalism. While Weber viewed capitalism and Protestant ethics as two individual phenomena with an elective affinity, Sombart saw the rise of capitalism as the manifestation of the modern capitalist spirit. This manifestation was materialized in history through psychological incentives shaping individuals' intentions, such as the desire for ostentation, the pursuit of social power, Protestant ethics, and Jewish ethics. On a larger scale, social needs, such as the demand for luxury goods and superior military armaments, promoted the extensive application of instrumental rationality.

In conclusion, this study underscores the significance of understanding the methodological and philosophical underpinnings of Weber and Sombart to appreciate their respective theories on capitalism. By examining their intellectual contexts and their nuanced perspectives on modernity, we achieved a richer comprehension of how cultural, religious, and psychological factors interplay in the development of capitalist behavior.

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