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Beyond Weber: Social change between disenchantment and rationalization processes in plural communities

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1 A Weberian approach to social action

More than a century after Max Weber, the issue of axiological neutrality, or in Weber's terms 'value-freedom' in the social sciences, is once again being raised with exceptional acuteness in the realm of education. The freedom to research, publish, teach, and learn a variety of subjects stemming from different and sometimes conflicting value spheres is being hotly contested. For instance, in Palm Beach, Florida, a teacher's contract was suspended 'after complaints that he was indoctrinating students during his lectures on racial justice' (Pelletier et al., 2023). Consequently, 'Gov. Ron DeSantis signed legislation ordering Florida state colleges to publicly share the textbooks and instructional materials required for "at least 95 percent of courses" offered in an academic term' (Pelletier et al., 2023). This measure, in practice supported by the Individual Freedom Act, also known as the 'Stop WOKE Act', amounts to 'unconstitutional classroom censorship that restricts teachers and students from learning about and discussing race and gender' (Woodward, 2022). Politicians like DeSantis not only try to dictate which among countless thematic subjects should be open to critical reflection and regarded as socially relevant for students' academic development; they also decide which perspectives should be privileged for discussion in the classroom. Indeed, 'he accused the university of betraying its values-based mission by being "complacent" on an important topic like race' (Marcus, 2023) under the pretext that it was politically motivated by woke culture (Marcus, 2023).

This stance decidedly contradicts Max Weber's staunch support for 'ethical passion for academic freedom' (Shields, 1949, p. v; Wessely, 2011), which he understood as value-freedom (*Wertfreiheit*) in research and the freedom to teach and learn (*Lehrfreiheit* and *Lernfreiheit*) in the classroom; it also runs counter to his emphasis on preserving intellectual integrity and objectivity in the social sciences (Kemple, 2023). In fact, as Shields points out (1949, p. ix), Weber contributed to clarifying the problem of conflating 'the false identification of an apolitical attitude with scientific integrity,' and his arguments should help us 'to refute the unfounded charge that the social sciences are ethically relativistic or nihilistic in either their logical implications or their empirical consequences.'

However, Weber would not be surprised by these positions. He believed that 'the "points of view," which are orientated towards "values," from which we consider cultural

objects and from which they become “objects” of historical research, change’ over time (Weber et al., 1949, p. 158), and thus acquire distinct and novel characteristics in different historical periods. Consequently, ‘every significant value judgement about the aspirations of others must be a critique from the point of view of their own *Weltanschauung*; it must be a struggle against the ideals of others from the point of view of their own ideals’ (Weber et al., 1949, p. 60). In the current context of university teaching and research, the struggle to achieve the greatest possible objectivity is integral to the vocation of scholarship, which, in Weber’s view, ‘might also be lived as the art of understanding the mutuality of meanings, and the vigilance needed for either keeping watch over or engaging in the conflict between values’ (Kemple, 2014, p. 199). In Weberian terminology, this approach, which lies at the heart of a comprehensive sociology of phenomena or ‘science of reality’ (*Wirklichkeitswissenschaft*), represents ‘the “value-analytical” interpretation which enables us to “understand” [our] relations to values [*Wertbeziehungen*]’ (Weber et al., 1949, p. 147).

From a Weberian perspective, it is not enough for the researcher merely to rely on source materials and technical tools; instead, a careful selection of topics and a rigorous interpretation of events must also be made. For Weber, the methodical gathering of facts, although indispensable, is only a prerequisite for interpretation and a stage in the explanation of such data within the social sciences (Weber et al., 1949, p. 146). This stage must be complemented with an analysis of the values that guide judgments and opinions, and therefore ‘involves my “taking an attitude” in a certain concrete way to the object in its concrete individuality; the subjective sources of this attitude of mine, of my “value-standpoints”’ (Weber et al., 1949, p. 150). That is, it involves examining and acknowledging the researcher’s (or teacher’s) own ethical, intellectual, and political commitments. By highlighting shifts in socially acceptable perspectives on a particular subject, which stem from changes in associated values and preferences, and underscoring how these align with one’s stance towards a given subject, Weber introduced the study of values and rationalities into the realm of social sciences. This pioneering move inaugurated the field of investigation into the meanings and motives of social action.

According to Weber, the claim to understand a given historical period presupposes the theoretical-interpretative task of recognizing the way in which “ideas” are “incorporated” into or “work themselves out” in the political structures in question’ (Weber et al., 1949, p. 150). Given the current resurgence of divisions and conflicts between various groups and cultures in today’s world, it is imperative to adopt a Weberian theoretical-methodological approach for a value analysis of contemporary societies. This approach can aid in reflecting on our actions, as ‘we are at an inflection point in our collective understanding of the intersections of race, gender, class, and colonialism, and how they have shaped our world today’ (Cayley, 2021), amidst rising nationalism, growing inequalities, the difficulties of coexisting in urban areas, and threats from the fourth industrial revolution, including artificial intelligence, climate change, and disinformation. By incorporating Weber’s analytical framework into our investigations of these issues, we can gain valuable insights into how individuals incorporate socially available logics of action while being influenced by their own aspirations and collective expectations as they become objectified within available grammars of action. Examining these repertoires or grammars of actions contributes to social scientific knowledge, which Weber defines as ‘knowledge which has been derived from our own experience and our knowledge of the conduct of others’ (Weber et al., 1949, p. 174).

The primary objective of this special issue is to showcase articles that align with this Weberian objective. We begin by highlighting the articles by Manuela Mendes and Frank Eckardt. Their work explores the potential and limitations of using Weberian conceptual tools in studying collective identities. Specifically, both authors aim to evaluate the value-relevance of two concepts – the European city and ethnic relations – which are still relatively underexplored by Weber, although they are now considered standard topics of social scientific investigation. Following Weber, the articles by Mendes and Eckardt demonstrate how these concepts originate from political communities, representing a possible historical solution to a recurring problem of social organization (Mommsen, 1980, p. 171). They draw on Weber's heuristic approach of 'disclosing facts' (Weber et al., 1949, p. 147) in order to unveil, beyond the abstraction of concepts and categories, 'a thoroughly concrete, highly individually structured and constituted "feeling" and "preference"' (Weber et al., 1949, p. 147). Like the other articles in this Special Issue, each adheres to Weber's assertion that establishing the adequacy of an ideal construction to empirical reality is paramount in social scientific research (Weber et al., 1949, p. 147).

Mendes tests the applicability of Weberian ideal types such as 'ethnicity' and 'race' on one of Europe's most vulnerable communities, the Roma/Ciganos living in Portugal. The notion of 'race' within this community differs from the conventional scientific definition that has now fallen into disuse. At a time where political factions are actively attempting to promote racialization and ethnicization with regard to social inequalities (Bello, 2023), the author explores whether group action based on specific ethnic values and conduct is subjectivized by the Roma/Ciganos themselves. In this sense, the Weberian urge to look for and understand plurality and diversity (Weber, 1978) is still timely.

Eckardt delves into the potentialities of the European city model, building on the assumption of community civic values, which Weber treats as a priori conditions for the development of urban socio-spatial rationalization processes, and which currently operate according to a multi-scalar logic: from global to local.

A second set of articles explores the exercise of a value-interpretative approach in two different spheres of rationalization: art and science. Guerra revisits Max Weber's writings on the sociology of music and extends his insights to examine recent developments in computer-generated compositions, while Delaunay conducts a sociological interpretation based on empirical research involving medical specialists and embryologists operating in the field of assisted reproductive techniques (ART). Both articles reflect on the potential as well as the limits of technical-instrumental rationality (*Zweckrationalität*), at the same time taking up the 'old' Weberian theme of the disenchantment of the world and the anthropological conditions of the possibility for liberation from rationalized processes of socialization. They emphasize the threat of irrationality caused by rationalization processes, which run the risk of escaping human control, and each questions the aesthetic, scientific, and ethical limits of technical-instrumental rationality.

With regard to the field of art, Guerra's article extends Weber's (Weber et al., 1949, p. 38) argument that the 'creation of new techniques means above all increasing differentiation and offers only the possibility of increasing the "richness" of a work of art in the sense of intensifying its value.' Rationalization in art renders neither aesthetic judgment nor 'the value-interpretative approach' useless, Weber argues, unless it is considered apart from 'the purely empirical-causal approach' (Weber et al., 1949, p. 38). The rationalization of art – including today's digital recording technologies and artificial intelligence compo-

sitional programs – does not inherently denote a route to its ultimate refinement, given that ‘the various technically rational principles conflict with each other, and a compromise can never be reached from an “objective” point of view, but only from the concrete interests involved at the time’ (Weber et al., 1949, p. 38). Consequently, Weber insists that ‘whenever one wishes to affirm a value judgement, it is necessary to take into account the subjective and objective social influence of technical rationalisation’ (Weber et al., 1949, p. 38).

In the realm of science, besides the perils presented by artificial intelligence mentioned above, novel areas of rationalization are also becoming evident. Delaunay examines one such area: assisted reproductive techniques (ART). In response to a challenge initiated over 25 years ago by Albrow (1987), Delaunay demonstrates how scientists utilize an array of rationalities of action, including the traditional and affective sub-types. Reflection and ethical judgment regarding the regulation of scientific production and its applications in areas such as reproductive technologies are paramount. Furthermore, as Delaunay shows, the significance of considering human emotions lies in their ability to engender novel modes of social engagement that serve as alternatives to instrumental rationality. Hope, for instance, has the power to give plural meanings to the rationalization processes of ART (Gouveia & Delaunay, 2023). It is also capable of producing new ways of thinking for people insofar as it ‘creates the route to attain their goals and to have confidence towards the fulfilment of their goals’ (Baciu et al., 2016). In this regard, as Baciu et al. (2016) have noted: ‘Hope predicts achievement better than intelligence, grades or personality traits. Therefore, helpfulness is a must-have ability for today’s digital natives’.

2 A Weberian approach to social change

Understanding the cultural and historical frameworks that shape social action is crucial to a more objective understanding of our actual experience as a way to make explicit the circumstances that contribute to meaningful social change. It is also essential to comprehend how forms of domination and structures of oppression operate, hindering social change and limiting the scope of social action. To this end, neo-colonialism – the materialized manifestation of colonialism and neoliberalism’s joint effects – makes use of patrimonialism, communism, and racism as political forms of oppression by forming reified structures that impede aspirations for social change.

Castellano-Durán and Laurano’s articles delve into the persistence of colonialism and patrimonialism as forms of domination in Bolivia, the Middle East, and North African (MENA) countries. These entrenched ‘systems’ have proven resistant to change despite efforts to dismantle them. In contrast, articles by Nazarska and by Caetano and Mendes examine a related theme that was especially close to Weber’s heart: the role of religious congregations in driving social transformation. Nazarska conducts a historical analysis of Bulgaria’s political regime shift, specifically highlighting the transition from Communism to more democratic forms of governance. Caetano and Mendes examine the evolving mindsets of Portugal’s Roma/Cigano ethnic minority, with an emphasis on their gradual embrace of education against the longstanding tradition for decades within this community, which encourages adolescents to abandon schooling.

Castellano-Durán's and Laurano's articles analyze the intricacies of political rationalization in 'sensitive' geopolitical regions, namely Latin America and the MENA region. Their work openly scrutinizes the shortcomings of recent political reforms implemented within these areas in recent years. These unsuccessful reforms represent a hammer blow to the moral and political aspirations of the peoples of these regions. The authors' reflection on neo-patrimonialism is relevant also to the older or newer authoritarian or soon-to-be authoritarian political systems of the Eastern European regimes (see, for example, Szombati, 2021; Ferenc et al., 1983). It can also bring a fresh understanding of or put into a new light the Cuban revolution or the socio-political changes in the countries of the South American continent (Cumbrera et al., 2020; Holbraad, 2018).

In the case of Bolivia, the state's impotence in translating the traditional indigenous ethos of 'Vivir Bien' into concrete and inclusive public policies has caused discontent among the most vulnerable social groups. There was a well-documented tension between the development of the legal framework of the 'Vivir Bien,' a political and social project that can be regarded as innovative, and its implementation in and impact on society. Also, this movement raises questions regarding the ethical relationship between development and the natural environment, which can become a contested political project, partly due to the activation of clientelism (Ranta, 2022; we may also think of the Roşia Montana and Sweighofer cases in Romania or the cyanide pollution of the Tisza River in Hungary).

Meanwhile, in the MENA countries, authoritarian and militaristic practices are suppressing democratic ideals among the younger generations who seek change amidst the increasing influence of ethnic and religious radicalism.¹ In Bolivia, 'Vivir Bien' (Living Well) clashes head-on with bureaucratic practices rooted in the colonial past in the form of 'Raison d'État' (Reason of State); in MENA, democratic impulses clash with the neo-patrimonialist legacy characteristic of these political regimes.

The relevance of Weber's theoretical insights to these cases is unquestionable. Indeed, in *Economy and Society*, Weber was cautious about 'The Technical Superiority of Bureaucratic Organisation over Administration by Notables.' Laurano follows Weber's argument that demands from the masses for 'substantive justice, oriented towards some concrete instance and person, will inevitably clash with the formalism and cold, rule-bound "matter of fact" of bureaucratic administration' (Weber, 1978, p. 980). Weber goes on to demonstrate that 'the material destiny of the masses depends on the continuous and correct functioning of the increasingly bureaucratic organizations of private capitalism, and the idea of eliminating them becomes more and more utopian' (Weber, 1978, p. 987). In a similar way, the Weberian idea regarding the challenging transformation of a traditional and informal ethos that represents the aspirations of the most susceptible groups within the domain of formal-instrumental rationality informs Castellano-Durán's approach to the operational methods employed by non-governmental organizations (NGOs) in developing nations like Bolivia. These NGOs have inadvertently adopted management strategies and solutions that prioritize development cooperation through a formal-instrumental

¹ Like the historical regime changes in Eastern Europe, the 'Arab Spring,' which started in 2011, was also an outcome of a longer, more or less evident, resistance to development against the local authoritarian regimes (Tripp, 2013, p. 17).

rationality lens, resulting in unintended consequences despite their good intentions. On the one hand, this inevitably created friction between the population and the political and institutional sphere. On the other hand, it reminds us of what Habermas said about communicative rationality when social rationality exerts its power behind the actions of a system (Habermas, 1994).

Laurano examines the 2011 uprisings in the MENA countries, commonly referred to as the 'Arab Spring,' with a focus on exploring the feasibility of these movements toppling seemingly impregnable regimes that have held political sway over the region for numerous decades. The movements ultimately proved unsuccessful in nearly all of these nations, as they were unable to effect a reversal of the entrenched hierarchical power dynamics perpetuated by neo-patrimonialism. A significant body of literature discusses these movements in different types of authoritarian regimes in the Middle East and their success in securing both long-term survival and legitimacy and the Arab uprisings (Schlumberger, 2006; Levine, 2013; Seeberg, 2015). These studies raise a legitimate question: How can we explain some long-lasting social forms and their continuous reproduction in society in the context of social change? (See also Böröcz, 1997). Lack of economic development and political crises, or on the contrary, the adoption of neoliberal policies and the commitment to the so-called processes of modernization do not explain entirely the present-day outcomes of processes in the MENA region. There is a need to take into account the colonial past and the relationship between occupier and occupied and to consider the variety of leaders and types of support they receive in legitimating their authority and positions. Acknowledging the use of the Weberian ideal types in understanding such political developments, Szelényi and Mihályi (2021) propose another typology to analyze systems of domination in the twenty-first century. They claim that since these systems are hybrid and because social changes, in fact, pendulate between these types, there is no singular direction of change. Their argument might offer an answer to the questions that Laurano's article raises. Furthermore, the transition to democracy, a Western concept, remains elusive in the MENA region due to political administrations that often maintain connections with judicial and military power-holders – a characteristic of patrimonialism in the modern context. Western countries remain concerned with the quality of democracy in the region and specifically worry about dysfunctional effects stemming from bureaucratic rationalization and its instrumental structures.

The last set of articles, grouped here according to their elective affinities with one another, deals with another theme close to Weber's heart: the possibility of promoting social change through the action of charismatic movements or personalities. Religion serves as a pivotal agent of transformation, providing an ideal platform for the emergence of charisma and the activation of a calling. Both Nazarska's article and the one by Caetano and Mendes emphasize the role of charismatic religious congregations in changing mentalities and practices. In Nazarska's analysis, religion played a crucial role during Bulgaria's political transition from Communism to democracy, while in the scenario examined by Caetano and Mendes, it facilitated subjective changes in schooling investment among young Portuguese Roma/Ciganos residing in Lisbon and Porto metropolitan areas. These articles aim to analyze social transformation through the lens of the Weberian prism (Kemple, 2014, p. 129), constructing specific 'historical individuals' and investigating the significance of values, particularly religious tenets, in potential correlations with scrutinized

phenomena. The authors report on the emergence of a sense of community capable of being transformed into a spontaneous belief and a kind of solidarity, thus participating in a 'spirit' capable of changing individual behavior.

One of the main challenges confronting the European Union is precisely the role and functioning of public administrations in democratic systems. In an era of profound uncertainty, marked by technological and environmental perils on a global level compounded by successive political, economic, and social upheavals, governments are increasingly called upon 'to develop better public policy outcomes and high-quality public services that respond to the needs of their citizens, and to transform their internal operations on the go, creating modern and innovative public administrations' (EC, 2023). As Weber had anticipated, state bureaucratic machines are often hindrances to the openness of public procedures and decisions, impeding citizens' widespread participation in promoting the common good. This creates an insurmountable gap between individuals and the state, emphasizing the importance of comprehending past events in order to envision and realize future possibilities.

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