

Sombart's *Der Bourgeois*: economy and politics in the *Spätkapitalismus*

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Abstract

The aim of the paper is to analyze the work of Werner Sombart starting from his criticism of capitalism and of the bourgeois spirit. In the course of the paper we focus on the so-called conservative turn of Sombart and his gradual distancing from Marxist literature with which he had previously interacted intensively. Our intention is mainly to understand the relationship between the thought of Sombart and some key concepts, such as socialism, liberalism and democracy. As Sombart is essentially a scholar of economics, more than one interesting element can be found in his work in relation to his conception of the ethical state and organic community. We conclude the paper with an attempt to historically contextualize the thought of Sombart who is absolutely a product of his time. In the years when Sombart wrote and worked, the crisis of liberalism and individualism was a fact, discussed in the international scientific community by various scholars of socialist and social-democratic leanings but also by the theorists of liberalism, as well as by authors such as Schmitt and Gentile who explicitly joined Nazi-fascism.

Keywords: Werner Sombart, Crisis of liberalism, Organic community, Ethical State, Capitalism, Bourgeois spirit

1. *Der Bourgeois*

When, in 1913, Werner Sombart published *Der Bourgeois*, he was universally known and admired as “der rote Professor”, because of his explicit scientific reference to K. Marx, and his original contribution to the history of socialist movement. *Sozialismus und soziale Bewegung im 19. Jahrhundert (1896)* had had great success not only in Germany, but in the entire world (Epstein 1909, p. V) and *Der moderne Kapitalismus* was considered an innovative work, able to open new fields of inquiry in economic history and in sociology (Brocke 1996, esp. pp. 59-68, Lenger 2012, esp. pp. 115-135, Cavalli 1978, esp. pp. 26-41, Saporì 1944, Saporì 1955, I, esp. p. XII ff).

Der Bourgeois set scholars and readers of Sombart in front to significant changes with reference to methodological approach, analytical perspectives and, of course, scientific outcomes. After 1913 other radical changes followed. These changes led Sombart's interpreters to ask how and why the follower and admirer of

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Karl Marx, the theoretician of the socialist movement, the scholar who exalted the Trade Unions on the building of a fairer society through the spread of reformist policies, became a social-conservative theoretician, showing (in 1934) explicit sympathy for Nazism.

Many attempts have been made to explain the origin of these contradictions. Some authors explicitly mention Sombart's opportunistic attitude, extending to his entire life his attempt in the Thirties to gain credit with the major representatives of the Nazi party (Reheis 1996, I, pp. 173-191; Rieß 1996, I, pp. 193-204), others mention his character and some of his peculiar psychological motives (Mitzman 1973), yet others, the effect on him of the changes in the political and cultural climate during the first quarter of the Twentieth century. In this paper we do not want to return to the impressive amount of literature on Sombart devoted to these aspects, because we are convinced that they cannot explain the changes in his analytical approach. They might, if anything, be considered as adding aspects on the emergence of new scientific attitudes in Sombart. In our opinion, Sombart's scientific contradictions have their roots – as Schmoller and Max Weber pointed out – in his methodology and his confused epistemological vision.

The interpretative key that we are adopting is the following: Sombart organized within a unitary interpretative canon his enormous quantity of research materials and outcomes of his remarkable scientific curiosity as long as he adopted a basic Marxian view – even though revisited. Of course, the scientific results of this phase of the Sombart's work can be questioned, as well as his peculiar way of interpreting Marx, but the unitary character of his analytical perspectives is fully recognizable. This continuity on the epistemological and methodological plane stopped, when he wrote *Die Juden und das Wirtschaftsleben* (1911) with the task of accentuating – on the basis of the Weberian stimulus – the meaning of spiritual factors in the genesis and explanation of economic and social phenomena. From then on, we can see a true scientific disorientation. Sombartian analysis became more and more ideological and, as a result, over-determined by the cultural and political changes of the German context.

Now, coming back to *Der Bourgeois*, the changes in the analytical perspectives are evident in many aspects. In this paper we will emphasize these changes with reference to three basic issues:

- the shift from trusting the industrial economy to an anti-industrialist and anti-capitalist vision;
- Sombartian anti-socialism, after a long period of exaltation of the progressive role of Socialism and the worker movement;
- the emerging of a strong anti-liberal and anti-democratic vein in Sombart's work.

2. Sombart: Capitalism, Socialism, and Social Progress

In Sombart's opinion, the progressive function of capitalism was manifested above all in its ability to free mankind from the ties of the medieval world. Individualism, the market, new institutional systems, the spread of science and technology have been the

constitutive elements of this process of emancipation. The birth and predominance of the two modern classes – bourgeoisie and proletariat (Sombart 1909, p.2)¹ – and the dynamics of their conflict represents the key of the accelerated development of a new social system. Besides, the evolution of the structural condition of the systems of production, the evolution of the political and institutional context, in cooperation with the growing awareness of the proletarian class as a political subject, were realistically enabling the building of an economy and society grounded on different principles. In other words, the progressive function played in the previous centuries from bourgeoisie was now passing to the proletariat (Sombart 1909, p.279 ss).

In the contemporary society there were visible aspects and movements «brought about by the proletariat», which could be properly interpreted only in the perspective of the transition from Capitalism to Socialism (Sombart 1909, p. 15). For this, Sombart writes in his *Sozialismus und soziale Bewegung in 19. Jahrhundert* – his purpose was «to show the growth of this two-sided phenomenon from its very beginning, and to discover the so-called laws of its development» (Sombart 1909, p. 14). In this sense, Sombart recalled many analytical aspects which were largely present in the literature of his time (from Marx to the representatives of the German economic school), emphasizing the speed of economic and social changes, and the way they affected the behavior of the social actors.

As we will see, Sombart's insistence on these features of modern capitalism are recurrent in his work: we find them in his interventions in the meetings of *Verein für Sozialpolitik*, in *Sozialismus und soziale Bewegung in 19. Jahrhundert*, in *Der moderne Kapitalismus* and in many of his other studies. However, these recurrent components of his analysis assume a different scientific meaning according to the various theoretical contexts in which they are found, leading to radically different diagnoses of capitalism and its future. So, if in the first long phase of his scientific activity (until 1910), these aspects were interpreted as a sign of the overcoming of the old economic structures, the traditional lifestyle and the inadequate social relationships, emphasizing the historical necessity of a new social organization, grounded on a communitarian spirit; from 1911 Sombart organized the materials and sociological observations which surfaced in his work in other analytical perspectives. As a result, the acquisitive spirit, the speed of economic changes, the breaking up of the traditional social relationships, and even science and its technological applications were interpreted as negative phenomena, able to produce the corruption of human soul, the spread of an immoral individualism and an irreversible dissolution of the communitarian spirit.

In the first edition of *Der moderne Kapitalismus* Sombart outlines not only the intensity and speed characterizing «the new style of economic life (*der neue Stil der Wirtschaftsleben*)», but also the positive effects of the «new Technology», the «new juridical context», etc.; all those components decisive for the development of the entrepreneurial spirit of the modern economic system.

The same view, we find in all the editions of *Sozialismus und soziale Bewegung* (with the exception of the tenth edition, *Der proletarische Sozialismus*,

¹ We generally quote from the English translation by Epstein of the sixth German edition of *Sozialismus und soziale Bewegung*, Gustav Fischer, Jena 1909.

published in 1924²). In the sixth edition, for example, Sombart focuses, with his lively style, on the features of the modern age «characterized ... by an intensity of life such that I cannot conceive of any other age». It is «accompanied by what may be called the nervousness of our time – the restlessness, the haste, the uncertainty of all forms of life. ... the age of free competition has brought competition into all walks of life ...» (Sombart 1909, p. 12). The worldwide competition is accelerated by the new means of communication, the spread of science, the application of technological innovations in all fields of social life, the increase of the level of productivity and consumption, and – finally – by a higher development of the general level of knowledge. The continuous interaction between material growth and spiritual development, at the heart of the new social order, speaks the language of historical necessity, of the spread of “revolutionary spirit”, leading to the possibility of a Socialist organization of society:

«Everything is in flux – economic activity, science, art, morals, religion; all conception are in such an unsettled state that we are beginning to believe there is nothing fixed and everlasting. ... This critical state of mind was already developed in the bourgeoisie; it has been applied to politics, morals, religion and art. The proletariat is only adopting it and applying to the economic and social institutions. [...] In this way the revolutionary present becomes the feeder of the social Utopia of the future. Edison and Siemens are the spiritual fathers of Bellamy and Bebel». (Sombart 1909, pp. 12-13)

It is evident that «the conditions necessary to bring about the organization of society on a communist basis are being developed within the frame-work of the capitalist economic system; that this system is itself producing the means whereby it will be abolished» (Sombart 1909, p. 82) . On this specific aspect, he points out, the theory of Marx and Engels, concerning the necessary transition from capitalism to socialism is “quite correct”. Correct is also their prediction of the inevitable tendency toward a planned economy (Sombart 1909, p. 82), given the level of socialization of production, induced by the economic dynamics of capitalism; the «universal tendency for the process of production to become automatic», because of the extraordinary development of machinery (Sombart 1909, p. 80), the way the «capitalist system develops» production processes where “it becomes easier to replace individual direction... by communist direction”. (Sombart 1909, p. 81, see also p. 82)

Marx’s analysis is “correct” not only because he focuses on the material conditions preparing the transition to socialism, but also because he focuses on the role played by the subjective and voluntary activities carried out by the proletariat (Sombart-Epstein 1909, p. 63). The «extreme importance» of Marxian theoretical

² In this edition Sombart was «a bitter critic of Marx and of the socialist experiment in Russia, about which his language was often vitriolic. A change seemed to have come over the foremost philosopher of Socialism; he appeared to be moving to the extreme Right, and when, in 1934, the final edition of the book appeared, it was called *Deutscher Sozialismus*, and was a plea for the Nazi political system!» (Epstein 1941, p. 525).

system «did not lie in the fact that it was ‘scientific’, but rather in that he showed how the social movement was the result of historic development...» (Sombart 1909, p. 88). In short, with Marx Socialism ceases to be a problem of knowledge and begins to become a problem of will (Sombart 1909, p. 40).

From this point of view, the idea expressed by many Marxists of a self-destruction of capitalism for economic reasons is incorrect and the Marxian expression: «Capitalism is digging its own grave» is not fully convincing. It «would be more correct to say that it was preparing its sickbed» (Sombart 1909, p. 87). In Sombart’s opinion, the problem of contemporary capitalism cannot be seen as the occurrence of a sudden collapse of its economy, but as a future characterized by a long phase of stagnation: «what the capitalist economic system produces are rather chronic periods of depressions, like those we had from the middle of the eighteen-seventies to the end of the eighteen-eighties» (Sombart 1909, p. 86).

However, if we look at the political and social changes of the present society, we will see the emerging of social experiences which we can regard as a useful model for the building of a new communitarian organization: «New communities (*Gemeinschaften*) are formed. Through close combination in narrow factory and living rooms, a uniform feeling grows in these masses, class consciousness. And this is precisely what the socialist movement makes its goal» (Sombart 1900, p. 88 ff).

In this perspective we have to consider the progressive function of England (a model «of our own future development») and of the Trade Unions: «Today, England still predominates over all other nations as a colossus in the external development of civilization; today, its economic prosperity has still not been even approached by any other land» (Sombart 1900, p. 14) At the same time, trade unions are showing the capability to overcome the ideas of utopian socialism, opening a continuous and successful confrontation with the representative forces of the capitalist system (Sombart 1900, p. 16 ff, Sombart 1909, p. 186 ff), developing «the positive sides of Capitalism» («*sie entfaltet die guten Seiten des Kapitalismus dadurch*»), and carrying out «the great historical mission of capitalism; to develop the forces of production». (Sombart 1900, p. 86). As a matter of fact, the Trade Unions on the one hand attenuated the severity of economic crises, increasing the level of wages and obtaining a better standard of living for the workers; on the other hand, they contributed to leading «the capitalist economic system in organic transformation to higher social forms (*das kapitalistische Wirtschaftssystem in organischer Umbildung in höhere Gesellschaftsformen überzuführen*)» (Sombart 1900, pp. 86-87): «*The innermost core of the conflict around the union problem is the struggle for industrial constitutionalism against industrial absolutism or feudalism (der Kampf um industriellen Konstitutionalismus gegen industriellen Absolutismus oder Feudalismus)*» (Sombart 1900, p. 88, Sombart Italics).

Considering the «point of view of the general development (*der Standpunkt der Gesamtentwicklung*)», the Trade Unions are leading the capitalist system toward a higher social order: «I think of the participation (*Mitwirkung*) of the Unions in the solution of the great problem of modern states, which we can summarize in the term Democracy (*das man in das Schlagwort der Democratie zusammenfassen pflegt*)» (Sombart 1900, p. 89-90).

3. “Die Juden” and “Der Bourgeois”: Sombart’s turning point

As we know, Sombart published *Die Juden und das Wirtschaftsleben* (Jews and Economic Life) in 1911, as a response to Max Weber’s *Die protestantische Ethik und der Geist des Kapitalismus* (Protestant Ethics and the Spirit of Capitalism) (Weber 1904-05). In the *Preface* Sombart writes that he came across this issue “really by chance”, after reading the Weberian essay and when he was on the point of revising *Der moderne Kapitalismus*³ (1902). In *Die Juden* Sombart opposes the Weberian theory of the influence of Puritanism on capitalism, with his «conviction» that the Jews have had «in the making of the modern economy a far greater role than has been acknowledged» (Sombart 1918, p. V).

In Sombart’s opinion, the “Jewish question” is a decisive factor in understanding and explaining capitalist rationalization and the spread of the “capitalistic spirit”: «I find in the Jewish Religion the same leading ideas (*dieselben leitenden Ideen*) which characterize capitalism: I see the first full of the same spirit (*von demselben Geiste erfüllt*) as the second» (Sombart 1918, p. 242). Capitalist rationalization is closely linked to the Jewish religion as an eminently rational religion; a religion “extraneous to magic” (Sombart 1918, p. 74; on this see also Weber 1997, p. 251-252), because it is based on a sort of contractual system between Jahvè and the elected people, in order to calculate rigorously the advantages and disadvantages of human activities (Sombart 1918, p. 75) In this sense, «the Jewish are capitalistic» and capitalism «is in many respects a manifestation of the Jewish spirit», which dominates «our entire era».

Not by chance, the Jew is presented with the features of a «pure business man», complying with the «authentic spirit of capitalism» and proclaiming «the predominance of gain, profit, and interest against all natural ends» (Sombart 1918, p. 155). Of course, the spread of the rationalization process, centred on accountability and on the predominance of profit, was not exclusively due to the Jews, but they had had a decisive role for the spread of capitalist spirit, the dissolution of the old economic structures, and the building of the new social order: «the peculiar and decisive importance of the Jews ... has to be sought in the fact that their activities are responsible for the acceleration of the transition of the economic forms of early capitalism to the economic forms of late capitalism» (Sombart 1916-17, p. 896; Sombart 1918, p.187). As is well known, this is a widely shared opinion (see also Simmel 1989, p. 580-581; Horowitz 1986, p. 14).

It was important to consider that the Jews’ contribution to the dissolution of the old community was brought from the outside, given their particular social position. Their talent for trade and their position as outsiders were two aspects of the same phenomenon:

³ *Der moderne Kapitalismus* was published in 1902. Sombart later revised his work, publishing the first two volumes in 1916-17, and the last volume in 1927.

«They derive their profit *from war*, murder, or assassination; while other people seek to derive it *by means of war*, murder, or assassination. Without a navy, without an army, the Jews work their way up to the position of being the mighty ones on the earth, using as their weapons those of the Florentines: money, treaties (i.e., contracts) and knowledge». (Sombart 1913d, pp.100-101, Epstein translation)

At the same time, their explicit task is not to build a new community spirit or a system of values able to create new social relationships, but to enlarge the business circuits regardless of its effects on the social organization. So, Jews are decisive in the revolutionary changes of the old system, but they are ruled by anti-communitarian values, favoring the spread of the materialistic and individualistic motives typical of late capitalism.

If we consider the business man of late capitalism, we find all the features outlined by Sombart with reference to the Jew as pure business man: the indifference toward mankind and the exclusive interest in his economic activity, as an activity «projected into infinity» (Sombart 1915, p. 173, Epstein translation). Of course, the decisive aspect is linked to the split between economic activity and human needs: capitalist enterprise, having lost the natural ties of the traditional system, is only oriented by the needs of indefinitely increasing the value of capital. Its ends «are abstract and therefore endless» («Die Zwecke der kapitalistischen Unternehmung sind abstract und darum unbegrenzt»). (Sombart 1921 [1903], p. 68)

In *Der Bourgeois* Sombart recalls such a statement:

«Man the fresh-and-blood man, with his joys and sorrows, with his needs and demands, has been forced from his place as the centre round which all economic activities rotate; his throne is now occupied by a few abstractions, such as Acquisitiveness and Business». (Sombart 1913d, p. 172, Epstein translation; see also Sombart 1918 [1911], p. 156 ff)

The indifference towards mankind is an internal aspect of economic activity, and a natural consequence of the way it is carried on:

«the expenditure of human energy in modern economic activities, extensively and intensively, is strained to the uttermost. Every minute of the day, of the year, nay, of life itself, is devoted to work; and during this working period every power is occupied at highest pressure ... Whether employer and employed, he is constantly on the verge of a breakdown owing to overwork ... Speed and yet more speed – such is the cry of the age. It rushes onward in one mad race». (Sombart 1913d, p. 181 Epstein translation)

It would be interesting to compare these statements with those, of the same kind, expressed by Sombart in *Die Juden* on the way Jews had broken up the «general atmosphere» of calm, respect and tranquility of early capitalism, imposing speed, pressure and frantic intensity in the business world (Sombart 1918 [1911], see esp.: chapter VII, pp. 136-180). Sombart concludes his reflection saying that Jews had

«attacked a stable and static world» and its «organization and economic spirit» (diese festgefügte Welt nur rannten die Juden Sturm) and broken up «the natural orientation» («die naturale Orientierung») of the old economic system (Sombart 1918 [1911], p. 147), beyond the protests of Christians (den Klagen der christlichen Geschäftsleute), imposing a new kind of man “an individual who in businesses is only a business man” (in Geschäften nur Geschäftsmann), exclusively considering the primacy of profit (den Primat des Erwerbszwecks)». (Sombart 1918 [1911], p. 155)

In the new social context, Sombart writes in *Der Bourgeois*, entrepreneurs consider men only as a function of the need for profit. They require freedom of action simply to achieve their economic ends, «liberty to enter upon or abstain from any course» as it seems convenient for them:

«It means emancipation from the trammels of law and morality ... it means that you object to interference either from the state or from working men’s organization in making your contracts. You want none of the restraints of an earlier age. The free exercise of your powers shall alone determine economic success and failure». (Sombart 1913d, p. 184 Epstein transl.)

In short, the entrepreneurs have lost their progressive function because they no longer have the sense of making a new community and of building more harmonious social relationships. At this point the question is: is there a subject or a class able to embody and carry out the progressive ideals inherited from the Enlightenment? Might the workers, in such a new situation, continue to carry the flag of human emancipation and fight for this goal?

In *Der Bourgeois* Sombart not only modifies his judgment about the progressive role of the entrepreneurs as protagonists of a process of economic growth able to develop (in Marxian terms) the level of productive forces, but he also radically modifies his judgment on the proletariat and its capability to transform the capitalist society. He is convinced that capitalism has deeply changed human nature both in the figure of the entrepreneurs and in that of the workers. On the other hand, as he writes in *Der moderne Kapitalismus* the hardness and the intensity of capitalist production processes require a rigorous discipline which in the long run radically changes human nature. So, the capitalist system as a whole destroys the sense of the centrality of mankind, having lost the «natural orientation» of the old economic organization and its communitarian values. At the same time, individuals (both the entrepreneurs, and the workers) necessarily introject the values of the new order. In late capitalism, individuals «internalize a particular attitude towards work», because they feel «obligated in front of the work», as Max Weber pointed out, by conceiving «the work as an end in itself, as a “vocation”»... (Sombart 1927, I, pp.424-425):

«Capitalism needed a “new mankind” in order to reach its ends. Men able to insert themselves in a big system, a capitalist firm ... in one of those relations systems of superiority, inferiority, adjacency , this artificial structures composed by men’s fragments. The new economic structure required these human segments: beings

without soul, depersonalized, able to be components, or better little wheels of an intricate mechanisms». (Sombart 1927, I, p. 424).

So, while for entrepreneurs profit represents the sole priority of their business, for workers the increase in material wellbeing is the new priority, disregarding the idea to reform or change the capitalist system. In Sombart's opinion, the workers "are completely conquered by the capitalist system of labor only when they have directly tasted the fruit of capitalism, when, as capitalism does, they orient all their thoughts toward gain, money, the enlargement of their own material existence"; i.e. the increase of their level of consumption (Sombart 1927, I, p.425).

As a result, neither the employers, nor the workers aspire to change the social relationships in which they live. Nobody seems really interested in building a more equitable society or pursuing the goal of "human perfection". The proletariat struggle is exclusively confined to the field of the distribution of social wealth. There is no aspiration towards an alternative system of production and towards an alternative use of wealth. In the epoch of late capitalism, the society now seems incapable of expressing from within the idea of a change which might make it possible to build a new community. In the sixth edition of *Sozialismus und soziale Bewegung* Sombart wrote:

«In the very first page of this book we defined the Social Movement as "the conception of all the attempts at the emancipation on the part of the proletariat as a social class". I should like now to limit this definition somewhat, and to add "in so far as these attempts at emancipation are characterized by the proletarian spirit"». (Sombart 1909, p. 131 Epstein transl.)

In late capitalism, the "proletarian spirit" aiming at creating a new social system, no longer exists. Socialism, as a planned economy, will be the outcome of the technical exigencies of the capitalist production and not the achievement of a social organization able to bring man and his needs back to the centre of human activities.

Not by chance, in the conclusion of *Der Bourgeois*, Sombart gets back to the impossibility of reforming capitalism:

«Some people ... expected to overcome it by appealing to ethical principles; I, for my part, can see that such attempts are doomed to utter failure. When we remember... that capitalism has snapped the iron chains of the oldest religions, it seems to me hardly that it will allow itself to be bound by the silken threads of the wisdom that hails from Weimar and Koenigsberg». (Sombart 1913d, p. 358, Epstein transl.)

Certainly, capitalism won't have in the future the same level of vitality as the past for different reasons: the increase of the bureaucratic aspect of the economic activity, the diminishing of the spirit of enterprise, change in demographic dynamics, etc.: «Possibly the blind giant may be condemned to draw the wagon of a democratic civilization ...» (Sombart 1913d, p. 359, Epstein transl.).

4. The criticism of capitalism as an attack on liberalism

In any case, it is not easy to think over Sombart's position on the issue of democracy. As we wrote in the previous paragraphs, Sombart is essentially a scholar of economics, interested in the development of the capitalist model towards which he holds a deeply critical position. Whatever kind of consideration about the political processes should therefore be reduced *to* and extrapolated *from* the reflections that Sombart dedicated to the economic model and its social implications.

In this direction, when Sombart challenges capitalism, which is the modern model of production, he inevitably rails against liberalism which, as the ideology of rationalistic individualism, is the theoretical framework of the modern condition.

Even the attention that Sombart pays to Marx is not a symptom of his adherence to revolutionary socialism and its consequences in terms of social and political organization. We can recall the aforementioned series of lectures on Marxian thought that he held in Zurich in 1895 that would lead to his 1896 work *Sozialismus soziale und Bewegung im 19. Jahrhundert*, then republished in the tenth edition in 1924 under the title *Der proletarische Sozialismus (Proletarian Socialism)* in which the author distinctly distances himself from his first remarks on the issue, assuming clearly anti-socialist and anti-Marxist traits. As noted by Robert Michels, a member of German-Italian elitism, Sombart was anything but Marxist; rather, he believed that in order to reach a more advanced social-economic critique, it was necessary to deal with Marxian literature (Michels 1908, p. 418).

Like Weber, and in a sense, like Marx, Sombart is methodologically interested in explaining the present from the identification of certain "historical social types". This emerges in several of his works, not only the famous ones such as *Der modern Kapitalismus*, but also and especially in the three works that in our opinion have to be read like three parts of the same thread: *Studien zur Entwicklungsgeschichte des modernen Kapitalismus*, vol. 1; *Luxus und Kapitalismus*, vol. 2; *Krieg und Kapitalismus* (all published in 1913 by Duncker & Humblot, Munich-Leipzig). Then summarized and systematized in *Der Bourgeois: Zur Geistesgeschichte des modernen Wirtschaftsmenschen* (1913d).

Sombart is lumped together with Marx and Weber, mainly due to his almost obsessive interest in the interpretation of the socio-economic model of modernity that takes on the traits of the capitalist social model. Marx focuses on the material and structural contradictions of a certain model of production that results in a conflictual dialectic between opposing classes, i.e. between opposing social interests. Weber focuses instead on the concept of rationality and rationalization, in the socio-political and economic field, read through the lens of "bureaucratization".

Sombart's approach, like that of Weber, is, in the words of current categories, "culturological". Unlike Marx, he is less interested in the development of capitalism in its real relations of production, than in its "spirit" which is the "capitalist mentality" that can be traced back to modern liberalism and to the social class that, for historical reasons, represents it: the bourgeoisie. In this Sombart is more Weberian than Marxist, although his findings lead him away from Weber, with whom he

sharply polemicized, especially due to the Puritan and Calvinist interpretation that Weber provided of that spirit.

If in *Die Protestantische Ethik und der Geist des Kapitalismus* Weber leads the capitalist mentality to the doctrine of predestination typical of a certain Calvinist Protestantism, Sombart, by distinguishing paleo-capitalism and ultra-capitalism, traces the moral and philosophical sources of that model of production much further back in the centuries, to the Christian doctrine of St. Thomas.

For Weber, the capitalist mentality can be traced to in a sort of earthly aspiration to holiness, while for Sombart it can be traced to the “greed of gain” and to a work ethic that deadens minds. At the heart of the capitalist economy (and in this Marxian influence is evident), there is not a living person with his needs, but rather an “abstract thing” like money.

If Weber focuses on the “impulse to work”, Sombart speaks rather of “greed for gain” independent of any aspiration to a meta-worldly salvation (see the critical reflections of Max Scheler in his *Vom Umsturz der Werte*, 1919). In this, as mentioned, Thomas Aquinas and the late medieval Christian Ethics seem more significant than Calvinism.

If the modern philosophical vein closer to the capitalist spirit is, in Sombart’s view, (liberal) utilitarianism, the ancient one is stoicism, both in its striving for the rationalization of life and in its suggestions for an orderly administration. But in reality it is Catholicism that is his major focus.

In contrast to Weber, Sombart is convinced that Catholicism in the phase of its maximum expansion favored capitalist development. In particular, he tracked down several prodromal elements in Thomism which has long been considered the official doctrine of the Church. The “fear of God” is in fact used by the Thomists to push men to act according to reason. In the Thomist logic, according to Sombart, the idea of gain and the economic rationalism do not mean anything but the need to apply the rules of religion to the economy. The Thomists fight idleness and condemn sloth, sympathizing with a model of intelligent and energetic man. Moreover, wealth is never condemned in the Thomistic philosophical tradition, as long as it makes good use and serves man and, through him, God. If the individual status brings eminent qualities, it is good that his efforts to elevate himself are rewarded with wealth, albeit within natural limits. Finally, the issue of the prohibition of usury. Sombart argues that it was strongly advocated because the Thomists (especially Antonin and Bernardin) realized that it was the opposite of capitalism, in fact they promoted the “return on capital” and never the “interest on the loan”.

Among other things, some reconsideration of the secular (and in some respects rationalistic) nature of Thomism is also to be found in political theory and especially in the final emancipation of the Pauline-Augustinian doctrinal tradition. Through Thomas, the late-medieval Christian doctrine learns to value the active life (in this regard see F. de Nardis, 2013d, chapter 1).

It should be recalled that Thomas Aquinas [1225-1274] lived in the era of the maximum temporal expansion of the Church of Rome, but he was a careful scholar and admirer of the classical Aristotelian tradition through which he attempts a “rational” systematization of Christian thought based on the harmony between faith

and reason, and on the recognition of the human world whose specific nature is not to be denied nor suppressed. The natural law is not in fact contrary to the eternal law of God, but participates in it rationally. At this point, the problem shifts to the political organization of the earthly world and to the possible balance between the “rationality of natural law” and the “conventionality of the human right”. Within this balance, the political community (the state) is identified as a necessary tool for the “good life”. In Thomistic thought the Augustinian distinction between the sphere of heavenly calling and the need to recognize essentially sinful earthly institutions is still present. Men are in fact seen as spiritually equal, but sin distinguishes them into slaves and masters.

Despite this, Thomas, in his *De Regimine principum*, identifies politics as the human instrument that is needed to achieve a happy coexistence. It is therefore nature and not grace that points to the urgency of a political body seen as a *congregatio hominum* with the aim of earthly wellbeing. The dimension of the *fidelis* concerns the sphere of individual conscience and therefore escapes the regulatory power of human law. Politics deals instead with the *civis* in the context of an outer sphere (that today we would call social and public), which requires regulatory measures that are articulated in a legal and regulatory system. Morality and politics (and, in the logic of Sombart, even morality and economic life) are already clearly delineated as separate domains and governed by distinct principles. To organize the community of men is not enough to contemplate the divine *veritas*, but we need to organize the coexistence of different subjects to which we must ensure acceptable levels of existence. The world of Augustine was by that time philosophically past and with it the distrust of the *malignum saeculum*. However there remains the attempt to organize the tools of reason through the precepts of the faith.

In contrast to what Weber argued, for Sombart Protestantism, having awakened the religious spirit, did not encourage the spirit of capitalism. Protestantism was more conducive to poverty than to wealth, as opposed to Thomism. Always on the level of moral and religious sources, the parallel Jewish tradition is, for historical reasons, perfectly consistent with the logic of the capitalist spirit. But we have already discussed that in the previous sections.

What concerns us here is that the critique of capitalism made by Sombart becomes a critique of liberalism which, in its social consequences, is at the basis of the entrepreneurial (and mercantile) mindset. Without the liberal ideology, capitalism would never exceed its primitive stage (paleo-capitalism). In the so-called paleo-capitalist phase the bourgeois did not attribute importance to wealth itself, but emphasized it only to the extent that it was functional to the creation and conservation of vital works. He worked just a little, because the logic of the *homo mensura* was still dominant. The modern economic man, that is the modern bourgeois, actually expresses an “ultra-capitalist” or “super-capitalist” spirit. The modern economic man does not practice a virtue, but follows a coercion. It is the pace of activity that decides the pace of his life. He cannot surrender to laziness.

The objectification of the economy as a virtue is revealed even more clearly. The modern entrepreneur is de-humanized and this is the product of a culture of competition, progress and individualism.

5. Against the capitalist spirit, for an high-capacity (and organic) state

In the second part of *The Bourgeois*, Sombart, showing his full sociological vocation, focuses on the social conditions that would exert an external influence on the spiritual development of modern economic man. Among these he devotes specific attention to the modern state.

Sombart is part of a larger tradition of social studies that, from Weber to the scholars of the post-classical politics, to the classic and contemporary studies of Charles Tilly and Gianfranco Poggi, attribute to the modern state a kind of vital energy, which could also transform the social anthropology of a people within a specific territory. Marx himself and, to a lesser extent, some neo-Marxist literature, in many cases tends to enhance the driving role of the state which takes place mainly in the phases in which social classes, although existing, are still in a state of poor cohesion and awareness of their role and their interests.

Again Marx, an important interlocutor for Sombart, did not deal with the state with the same emphasis placed on other aspects, such as property relations and the division of labor, but that is not why he did not leave important reflections about politics. The most common (and simplistic) translation of the Marxian conception of politics is that the state (and politics) would be represented as a simple epiphenomenon of the class struggle, as an instrument of oppression in the hands of the ruling classes to ensure political and legal subordination of society's workers. Indeed, this idea is present in Marx; yet, he is also convinced that if no class has achieved a dominant position over the other classes, the state is destined to enjoy a degree of autonomy, as occurred in France at the time of Louis Bonaparte (later Napoleon III). In those cases, the state may also take a potentially revolutionary role (Marx 1850; 1852). State institutions may in fact be functional to the new revolutionary forces in their attempt to destroy the structures of the old society. But when a new class comes to power, the state becomes an ideological and institutional tool to maintain stability in production and social relations. It is true that, for Marx, in bourgeois society, the economy and politics are *abstracted each other* and the state becomes an instrument in the hands of the dominant classes as part of a production model that travels on independent channels.

Coming back to Sombart, he regarded the state as the first great collective entrepreneur. It may also play a role in contrast to the development of capitalism and entrepreneurship, for example through strict government regulation and excessive taxation, or through its support in the face of "social classification" (Sombart's expression) of nobility, traditionally alien to the sphere of production. Despite this, the state took a leading role in many areas of propulsion of capitalism. Sombart, in line with a certain type of Marxian literature, finds that the state has repeatedly encouraged the development of a certain mode of production through policies in favor of capitalist interests. At the same time, as the first great entrepreneur, it has affected and affects the spirit of private gain with its rules in everything related to organization, and with its precepts, in all that concerns commercial ethics (Sombart 1913d).

In addition, through a specific economic policy it fostered the development of enterprise already in the paleo-capitalistic phase, promoting the market and the trades: the state pushes individuals into business with the tools of force and persuasion, for example, by waiving old medieval guilds and introducing the free professions. Furthermore, do not forget that, in some important cases, the state assumes great importance merely by “not existing”. Sometimes the singularity of particular political conditions led to a such an intense development of the capitalistic spirit that the community was not allowed, or allowed very late, to turn into a powerful state.

In any case, the branches of state administration that, for Sombart, would most favor the development of a capitalist spirit are: “military activity”, with particular reference to the creation of the professional army that allowed the development of bourgeois virtues, forming a middle class without any warlike interference; and “finance”, with reference to the financial economy of public bodies which was the first major case of “household management”. Through public intervention and the introduction of the “contract system” it was possible to build economic relations mainly going beyond the narrow circle of family or class. This mechanism more or less directly influenced the formation of the first speculative ventures; “ecclesiastical policy”, with reference to the emancipation of the Jews which allowed them to freely deploy their commercial and speculative attitudes. At the same time, the construction of national churches and state religions meant that many citizens, as heretics, had difficulty accessing public offices, therefore needing to develop private aptitudes that resulted in the spirit of enterprise free of community bonds.

Sombart believed that to limit the social consequences of capitalism, a strong state is needed, capable of directing the development of social and economic conditions. To use modern categories we would say that Werner Sombart is a supporter of the “High-Capacity State”.

In current political science, the concept of “state capacity” is connected to that of “protection”, i.e. the actual capacity of the political institutions to implement the decisions taken, protecting citizens against the abuses on the part of administrative officials or other extra-political actors (think of the forms of occult power or organized crime). In fact, Tilly writes (2011, p. 36), both an extremely low level and an excessive level of state capacity is likely to inhibit the development of the democratic process. This is because, in the first case, the state would not have the strength to protect the public in an appropriate manner; in the second case, it would risk a state so strong and decisive, even in its administrative structures, to make vain and irrelevant the mutually binding consultation between citizens and public authorities. From this point of view, an excess of state power inhibits the creation of spaces of democratic confrontation and, also in this sense, Sombart seems to assume a clearly undemocratic attitude, where democracy, especially in its liberal variant, seems to be the system of political organization more congenial to the development and consolidation of capitalism.

It is therefore against the English mercantile state that Sombart launches his criticism in favor of a state as the spiritual center of a national community. This concept strongly emerges in *Händler und Helden (Merchants and Heroes)*, published

in 1915 in support of the German military involvement in World War I (Sombart 1915). In this small anti-British manifesto in support of the war, Sombart controversially summarises many themes already present in *The Bourgeois*, anticipating ideas that would be further developed in the new edition of *The Modern Capitalism* (1916-1917) and re-presented in radicalized form after twenty years in *Der deutsche Sozialismus* (1934). He argues the historical necessity of the war in defense of the spiritual specificity of the German people, understood as *Kultur* opposed to the Western *Zivilisation*, the product of the French revolutionary values interpreted in a mercantile key by the English people.

In this Sombart is not alone. Other prominent intellectuals, although with different (and in some ways more sophisticated) arguments, engaged in the same effort. Think of *Der Krieg und die geistigen Entscheidungen* (*War and Spiritual Decisions*) by Georg Simmel, published in 1917 as a reworking of a series of lectures held in 1914. War is presented here as an opportunity for spiritual unification of the community. The exceptional states represented by the phases of military engagement are capable of raising individuals to a supra-individual dimension, strengthening social ties against the modern individualistic tendencies. The war becomes, therefore, an almost “providential” phenomenon against the emergence of “mammonism”. Thomas Mann’s reflections in this regard were not very distant. In his *Thoughts of war* (*Gedanken im Kriege*) published in 1914, then developed into subsequent *Considerations of an impolitic* (*Betrachtungen eines Unpolitischen*) published in 1917, he is located more or less on the same line, analyzing the opposition between *Kultur* and *Zivilisation*, defining the former as “elegant wildness” as opposed to the bourgeois spirit in some respects “anti-genial” (Watier 1996, 32-37; Koester 1996, 251-2 and 256).

Back to Sombart, without considering his patriotic reflections, in many respects not very representative of his intellectual journey and undoubtedly related to the spirit of the time, we wish to look more closely at his idea of the state and, in particular, of the German state that he connects to the spirit of the German people, stirred up about English mercantilism. According to him, against the prevailing culture in the West, the German spirit has rejected utilitarianism, hedonism and every philosophy of useful and easy comfort, for a spiritual life that led to the unity of the people. In this way the Germans have developed a heroic spirit away from the culture of English mercantilism produced by modern liberalism. It is warlike virtues, such as obedience, loyalty, piety, value, respect, that fully manifest themselves through war.

This heroic conception is manifested in the lack of consideration of the natural life of the individual, whose mission consists of sacrificing and achieving a higher spiritual meta-individual life. Within this spiritual community the idea of “Homeland” (*Vaterland*) takes shape. It results in the idea of the state as a higher spiritual entity. This is an objective-organic entity that is independent from the individuals who belong to it. A meta-individual state formed by a community of people (*Volksgemeinschaft*). It is organic as opposed to English mechanicism, in the sense that individuals should organically fit in a spiritual sense into the “spiritual all”. In Sombart’s conception the state is therefore a meta-biological living being.

6. The historical and intellectual environment, that is: Sombart in his time

In the previous paragraphs we have tried to re-read the work of Sombart focusing especially on *The Bourgeois*. We have analyzed his controversial relationship with socialism and his turn to conservatism while maintaining a strong criticism of capitalist arrangements. We have seen how his anti-capitalism results in an attack on liberalism and, in particular, on modern individualism and the impulse to gain. We have seen that, through his criticism, he returns to the idea of an organic society, harshly criticized by the young, proposing a nearly Hegelian conception of the state as a spiritual entity of a community that is independent from the individuals who compose it. He thus refers to the German conception of the state, an organic and objective conception, which is based on the idea that the state itself is not an aggregation of individuals nor is its purpose to promote any individual interest. In this state, individuals first and foremost have duties. Rights can arise only insofar as they correspond to the obligations and their fulfillment (see: Gioia 2014, esp. p. 29 ff).

It is evident that this idea of social and political community is functional to a non-democratic model of society which, in the 1930s, was in line with the authoritarian developments of the German political system. The *Fuhrerprinzip* itself guarantees the organic unity of state and citizens, and builds a defense of the nation (a higher living being) from external (and internal) enemies. These reflections were enough to ensure the poor editorial luck of Sombart, often accused, mostly by current sociologists, of political opportunism and of ideological and cultural subordination to national-socialism. Yet, what we must point out here is the historical and intellectual context in which Werner Sombart builds his thought. We are in an era in which the crisis of liberalism and democracy is on the agenda. It is not just a historical fact, but an element in the international scientific community. The same liberal theorists often voiced this concern.

In Europe, during the second half of the nineteenth century, the transformation of liberal political institutions was complete, but at the same time, the individualistic conception, which is an essential component of liberalism, was severely challenged. The development of industrialism was accompanied by powerful political and mass union organizations, which were the mouthpiece for a new idea of social and political community. On the other hand, the expansion of the international struggle for the conquest of new markets was accomplished through neo-colonial practices fueled by new nationalisms. From the inside of the social and political body, albeit from opposing fronts, various forms of protest against the liberal state emerged. These accusations were made through a real battle of ideas. The classical liberal view was no longer able to account for those new socio-political and economic imbalances. The most obvious effects were the revival of militarism and nationalism, culminating in World War I and the authoritarian degeneration of many political regimes who had also started a slow and gradual process towards democracy. The crisis of the Weimar Republic in Germany was a paradigmatic example. The socialist revolution in Russia and the rise of fascism in Italy, Portugal, Spain and Germany brought to a head a

crisis of the liberal institutions which, among other things, in 1929-1931 were strongly attacked by one of the most severe economic crises the Western world had ever faced.

On a strictly intellectual plane, there was a strong attempt at political and ideological revisionism. It took the crisis of liberalism for granted. We can find efforts of this kind in North American pragmatism and realism, in German neo-Kantianism, in historicism and in the first attempts at a new statement of sociology.

From the social-democratic and socialist field we recall the work of Harold Lasky (1893-1950), one of the leading theorists of the British Labour left. In his famous historical and theoretical reconstruction of the origins of European liberalism (Lasky 1936), he focuses on the British case, stating that the class relations established by industrialism and liberalism prevented the distribution of power to keep up with the power of production. The production forces were now in conflict in productive relations. The liberal idea was never able to transcend the environment that it had itself created. The Liberals failed to predict the conflict between the forces of production and, when faced with it, reacted in a chaotic way in order to preserve acquired privileges, which were defended to the point of destroying the liberal spirit itself. The criticism of liberalism on the part of another great leader of the social democratic world are oriented along the same lines. We are referring to Max Adler (1873-1940), a leading figure of the so-called "Austro-Marxism". Especially in his text on political and social democracy (1926), he maintains a critical perspective with respect to classical liberalism on the possibility of a virtuous integration between democracy and socialism.

From another point of view, the criticism to liberalism was also carried out by the American John Dewey (1859-1952), one of the most important figures of the philosophical culture of the twentieth century. In his book on *Liberalism and Social Action* [1991 (1935)] he argues that the beliefs and methods of liberalism proved to be ineffective to address the problems of social organization and integration. In an attempt to define first liberal economic man and then the political and legal man they forgot to define the man himself. The problem of freedom was thought to be solved through the institutional arrangement of representative government but, on the contrary, liberal individualistic atomism determined over time an intellectual reaction that took place in the revival of the organic and objective mind. For Dewey, the crisis of liberalism must be connected with the inability to sustain an adequate conception of intelligence integrated with social movements. What was lacking in liberalism was therefore a concrete program of social action that cannot be achieved through the convergence of causal and external actions of separate individuals.

As we said, the main reaction to the crisis of liberal institutions led to the birth of fascism which, at least in the initial phase, found support from a significant portion of the scientific community in Europe (especially in Italy and Germany). By the way, in our opinion, there are theoretical connections between fascism and the liberal conception that are discernible in the crisis of political democracy and in the imbalances that are generated in the elitist nature of parliamentary democracy, realized in the theoretical separation between state and society that is undoubtedly the ultimate source of political authoritarianism. We can also venture the hypothesis that

the success of fascism can be traced in the authoritarian vocation of liberalism itself. We can find the theoretical cornerstones of these forms of authoritarianism in the recovery of a certain state ethics, in new forms of demagoguery within the context of a mass society and in the claim of a new order achieved through authoritarian methods with a new mythology of the state and of the community of people.

The fundamentals of Fascism and Nazism are, *de facto*, those of liberalism: private property, national state, the elites in government, but enriched by a new conception of ethical community that is in contrast to liberal individualism. It manifests itself in the ideological support to new attitudes, such as loyalty, dedication, hierarchy, unique ideological foundations of a political authority that is realized only in the forms of violent repression. Within this context, as we have seen, Sombart's neo-organicist twist takes shape. Inter alia, it finds theoretical support in the work of two leading figures of the intellectual world of that time. We refer to Giovanni Gentile (1875-1944), in Italy, and Carl Schmitt (1888-1985), in Germany.

The starting point of the political philosophy of Gentile, a leading figure in the Italian academic and political environment, lies in his criticism to the liberal atomism and to the contrast between the individual and the state. In this there are many elements of similarity with the thought of the late Sombart. For Gentile, as for Sombart, the individual must be fulfilled in his morally total integration in the state political community (Gentile 1961 [1916]). In Gentile's conception of "ethical state" the naturalness of individual free will is exceeded. In the state authority ethical development of individuals is accomplished. Society is only possible as a state. In this sense, society corresponds to the concept of political authority and the individual naturalness dissolves into state totalitarianism.

For his part, Carl Schmitt, considered one of the leading theoreticians of Nazism, focuses on the centrality of social life understood as a decision-making power of the national will. In his view, politics is the destiny of humanity and its natural platform is War, both internal and external (Schmitt 1921; 1927). From here a voluntaristic exaltation of the force that manifests itself in a new totalitarian order. Sovereignty is for Schmitt the mere will of decision that finds its highest expression in dictatorship. He attacks democratic individualism which is in contrast with the spiritualism of the state.

This is therefore the intellectual and historical context in which the thought of Werner Sombart develops. He is fully part of his time. He leaves to us many memorable pages on his critique of capitalism and of the bourgeois spirit and, while not sharing the neo-organicist drift about which we have written, we cannot fail to note the importance of his thought for the subsequent development of the social sciences.

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