

Ideal type in sociological research¹

Abstract

This opinion paper aims to offer a contribution on the use of the ideal type as a research strategy, with the purpose of adding to the discussion of the advantages, but also the limitations, difficulties, and challenges to the implementation of this methodological tool. In conclusion, there is the need to select some specific dimensions of the object, with relevance and rigorous justification, being careful to neither over-simplify reality, nor bring complexity to it, to the point that this concept becomes unintelligible and without heuristic ability.

Keywords: ideal type, research, sociology

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Sandro Serpa

Department of sociology, University of the Azores, Portugal

Correspondence: Sandro Serpa, University of the Azores, Faculty of Social and Human Sciences, Department of Sociology, Interdisciplinary Centre of Social Sciences – CICS.UAc/ CICS.NOVA.UAc, Interdisciplinary Centre for Childhood and Adolescence – NICA – UAc, Ponta Delgada, Portugal, Tel 351964424554, Email sandro.nf.serpa@uac.pt

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What is ideal type?

“Comparison (for example, between empirical information, between theories, between researchers) is a widely used procedure in scientific research. A specific type of comparison consists of the *ideal type* (original proposal of the classical sociologist Max Weber), as “A simplified and schematic framework of the object of research with which systematic observation of the real [...] must be confronted”,¹ through typological analyses that, with “stylization or accentuation of essential features in fact, allow for the synthesis of research acquisitions in order to extract the fundamental characteristics or to elaborate an abstract model with which the ducts can be compared”.

The performance of this typological analysis, which still raises doubts,²⁻⁵ implies being aware of two great inherent difficulties, which Schnapper¹ draws attention to:

[...] if it is too abstract or close to macrosociology, if it is too general, it explains everything, therefore it explains nothing, and its operative value is weak. [...] if it is too close to empirical data and concrete realities, it is not distinguishable from historical narration, systematic description or orderly presentation of examples, and provides little understanding (pp. 155-156).

For these reasons, Schnapper¹ concludes that “it is necessary to define a degree of abstraction that is fair, that is, heuristically fruitful at a given moment for a particular object” (p. 156).

On the other hand, and according to Schnapper¹ the typologies should not focus on individuals, which could lead to processes of labelling people, nor should they disregard the basic principle of typology elaboration, which is to enable a comparison of situations or relationships through an abstractly elaborated mental scheme of reality.”

¹This article is a version of a Portuguese paper: Serpa^{6,7} utilização de tipo ideal como estratégia metodológica na apreensão da cultura organizacional. Associação Portuguesa de Sociologia (org.). 40 anos de democracia(s): progressos, contradições e prospetivas. Atas do VIII Congresso Português de Sociologia. Lisboa: Associação Portuguesa de Sociologia, presented in Secção Teorias e Metodologias, na Mesa: Metodologia das ciências sociais: novas questões de sempre, no VIII Congresso Português de Sociologia-40 anos de democracia(s): progressos, contradições e prospetivas, organizado pela Associação Portuguesa de Sociologia, 14-16 de abril de 2014, em Évora, na Universidade de Évora (15 de abril de 2014). We thank the participants for their valuable comments on this presentation that helped to enrich this paper.

Some issues about the use of the ideal type

The ideal type is not much used in sociological empirical research.⁵ In the ideal type of application, it means being aware to the need for some caution in the delimitation of the concept and in its operationalisation, in order to be able to respond to the research objectives.²

Whatever the information gathering procedure, it is essential to select and systematize the documentation according to its relevance,³ all the information collected, considering the purposes of the research, the theoretical framework and the type of material collected. This has to be done always with a posture of incompatibility with emerging tracks, preparing it to be worked on in a more systematic way.

During the process of collection of empirical information, we sought to bear in mind that “the processes of collecting information are themselves social processes”,⁸ which are not limited to the sheer mechanical implementation of an instrument, which poses risks of bias in the information collected.

It then becomes necessary to delimit features as defining dimensional attributes of the ideal type (or ideal types) defined and/or to be defined (as the research has a greater deductive or inductive dominance, respectively) through the construction of a typology(ies), in an analytic combination of deduction and induction, in which “there is a confrontation between historical and theoretical reflection and the data collected on the field”.¹

In addition to this work of collecting and analysing information, whenever possible and necessary, an effort should be made to compare information from different sources. The comparison, at various levels, in this research logic is a key process continuously present in research. Whenever feasible, a triangulation of the obtained information is sought, crossing it in several sources. In order to respond to the guiding objectives of research, the receptivity to receive unexpected clues that emerge from the information that results from empirical work should not obscure the respect for what Almeida⁸ call “the role of theory in empirical research” (p. 71). The authors⁸ also refer to the role of theory in induction:

It is not excluded, in the first place, that the collection of information on a concrete situation, which is always to some extent unique and the condensation of an infinity of determinations, while being guided by the previous theoretical framework of reference, need

to adjust, specify or even reformulate the latter, in order to make it a more accurate and effective guide to the observation of reality.⁹

Conclusion

“In sum, the use of the ideal type of investigative logic implies the need to select some specific dimensions, as “the result of a specific kind of induction”,² being careful not to oversimplify reality or to complicate it to the point that the concept in question becomes unintelligible.¹⁰ Only in this way it has the potential to function as a heuristic instrument³ in sociological research and in other social sciences.”^{11,12}

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Conflict of interest

The author declares that there is no conflict of interest.

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