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The quest of their epistemological roots**

Giuseppe Volpato and Andrea Stocchetti

Ca' Foscari Department of Management, Ca' Foscari University

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**Giuseppe Volpato\*, Andrea Stocchetti**

**Ca' Foscari University**

**Old and New Approaches to Marketing – The Quest of Their Epistemological Roots**

Dipartimento di Economia e Direzione Aziendale

S. Giobbe – Cannaregio 873 30126 – Venezia (ITALY)

[volpato@unive.it](mailto:volpato@unive.it) [stocchetti@unive.it](mailto:stocchetti@unive.it)

\* Corresponding author

## Old and New Approaches to Marketing – The Quest of Their Epistemological Roots

### *Abstract*

In recent years the marketing discipline faced a considerable increase in the number of approaches. This paper try to investigate if the proliferation of labels related to alleged new methods of marketing analysis actually implies a distinctions of subjects being studied and different epistemological premises.

### **1. In search of a conceptual classification**

#### *1.1 The proliferation of marketing problematics*

This article was born from the observation that marketing science is facing a growing proliferation of thematics and approaches. This fact is not new and generally coincides with significant transformations in the international economic system<sup>1</sup>. Lately, however, marketing studies favoured a fragmented interpretation of consumer and firm's realities, thus creating an explosion of new labels. Some of these new labels are probably just new "names" advertised to sell "old" products. But some may contain significant new issues that need to be identified and discussed. Do these new marketing denominations (viral, retro, vintage, postmodern, judo, tribal, buzz, and many more) identify distinctions on subjects being studied, without particular methodological implications, or rather, do new labels and new subjects imply orientations that start from different epistemological premises and involve different research methodologies? If the answer is affirmative, then what are the most significant methodological differences? The differentiation of actual content of various approaches to marketing has obviously already been dealt with in a large number of contributions, however, it seems that the range of different approaches has been considered primarily in terms of the object of study - consider, for example, the debates on micro and macro marketing<sup>2</sup>. A much less analyzed issue is whether a different object of study is also embedded in diverse epistemological hypotheses. Marketing, as Kotler thinks or describes it, seems to refer to methodological hypotheses and interpretative models that are substantially different from those that characterize postmodern marketing<sup>3</sup>. Our impression, in

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<sup>1</sup> We indicate, for example, debates of the 1960s on the *system and environmental approach to marketing* and in the 1970s on the consistency of scientific marketing and in those same years, on micro and macromarketing.

<sup>2</sup> See Hunt & Burnett (1982).

<sup>3</sup> See for example "Kotler is dead!" of Alan Smithee (1997), Brown (1995) and Cova (1996).

general, is that the effort of the authors to clarify the characteristics of new proposed approaches is too limited, leaving the reader with uncertainties on their methodological position. In particular, the aspect that we think is most neglected, and which is of crucial value for the correct understanding of new approaches, is the methodological, and especially the epistemological, characterization of the new scientific proposals. The risk of this proliferation of approaches<sup>4</sup>, insufficiently delineated in their epistemological assumptions, is incommunicability. Our objective thus is to undertake a taxonomy of methodological specificity that characterizes the most significant marketing approaches, seeking to highlight the epistemological differences and the effects that these differences produce in the way to interpret it. Our objective is not to evaluate the validity of the different approaches, a goal that would undoubtedly be of extreme interest, but which seems to us to be too ambitious in this particular setting<sup>5</sup>. We aim at building a taxonomic grid that allows a fruitful comparison of different methodological assumptions.

### ***1.2 The integration and opposition of the different epistemological schools***

Our taxonomy is articulated on the following three levels:

- a. the epistemological level or rather, the alternative approaches with which the methodological statute of the various sciences are defined;
- b. the economic theory level that defines the evolution of research approaches that are most relevant for economic science and therefore also for the firm theory;
- c. the marketing theory level with regards to their corresponding economic and epistemological approach.

This taxonomy range from general (1<sup>st</sup> level) to more specific themes (2<sup>nd</sup> and 3<sup>rd</sup> level). We assume, therefore, that there is a close connection between a 1<sup>o</sup> level approach and the corresponding and coherent approaches that can be identified on the 2<sup>o</sup> and the 3<sup>o</sup> level. In different words, one who, at the first level, assumes an epistemological approach of some kind (e.g.: “empiricist”) is expected to (or should) assume the same approach at the level of both

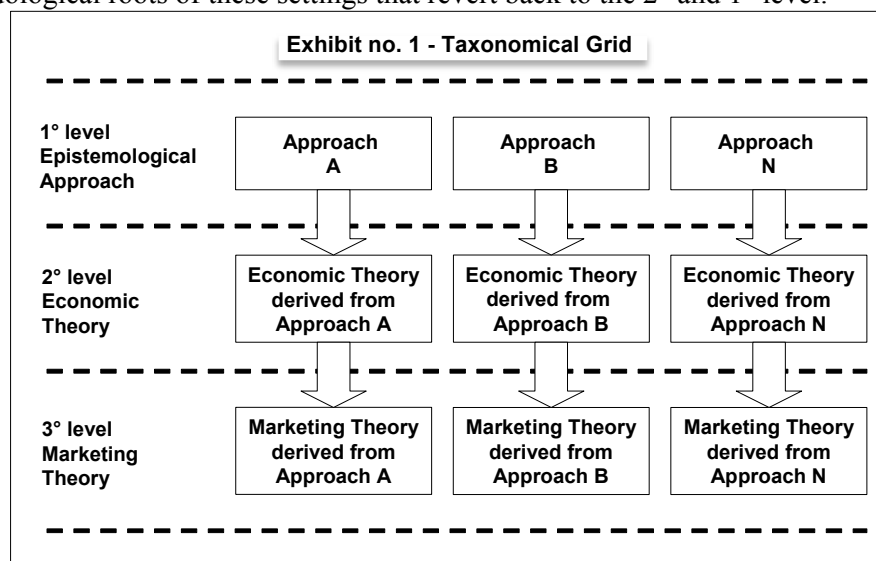
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<sup>4</sup> The analysis of the reasons for the proliferation of approaches would also be a matter of great interest that we cannot however tackle here, but it should be mentioned that some of the reasons are the globalization process and a proliferation of communication channels (ICT) through which new communicators are able to express their positions. Other reasons stem from the fact that the formulation of the different approaches has become part of a market system (management training market, university education market, consultancy market, etc.) and therefore the comparison of ideas does not always have a prevailing scientific basis.

<sup>5</sup> Of course the taxonomy inevitably entails some form of judgment, but here we will seek to build a reading grid, as neutral as possible, in an attempt to clarify the most significant specificities of different approaches.

economic and marketing theory (respectively, the second and the third level of the taxonomy).

Of course we are aware that our taxonomy is a simplification; however we believe this is an appropriate instrument to open a fruitful debate on the analysis criteria and on the subject matter in question. Maybe someone will want to revise some classification criteria here and there, while someone else perhaps will intend to review the whole taxonomy from its foundations. We accept this and we affirm that similar opposing arguments are useful and productive because this is what should take place in a mutual clarification of positions, instead of present debate, which is conducted in uncertain and disorderly way, without precise forms of comparison and without appropriate conceptual tools. For example, some may ask why analyzing the various marketing contributions we concerned ourselves with classifying economic and epistemological approaches as well. The answer is that a contrast of approaches and marketing theories alone (3° level) would not have allowed us to clarify (or attempt to do so) the classification. The meaning and scope of the various marketing theories can be expressed with sufficient accuracy only looking backwards at the methodological roots of these settings that revert back to the 2° and 1° level.



## 2. The epistemological level.

### 2.1 *The source of knowledge*

Epistemology or Theory of Knowledge is the science that studies knowledge in general, but above all, it studies the particular form of knowledge that is scientific knowledge<sup>6</sup> and therefore

<sup>6</sup> According to some, the only form of "real" knowledge is scientific knowledge and therefore this term also covers any form of knowledge, but we feel that this issue can be omitted here.

the scientific validity of the different sciences and scientific approaches. What we must achieve at this level is a classification of the approaches that were (and are) used as the basis of the various *theories of knowledge*. The difficulty in this classification is that each approach has gone through a long evolution and through numerous changes over time as a result of debates among scholars. We cannot give an account of the enormous variety of individual approaches and thus we propose to group them according to their prevalent paradigms<sup>7</sup>. However, although every paradigm is a living conceptualization, evolving over time, the modifications do not put their inner core in doubt. Thus, if in a synchronic sense it is possible that some paradigms have a well-defined identity, as can be said for example of empiricism in the XVII and XVIII century, in a diachronic sense the empiricist paradigm has somewhat changed as a result of the need to overcome intrinsic methodological difficulties and responding to criticism brought about by alternative research approaches. Unfortunately, in the space available in an article, it is necessary to introduce some simplifications but we think that this is acceptable with reference to the scope of our analysis.

In order to classify the different approaches from a methodological point of view we posed the following question: what is the source of scientific knowledge? The schools of thought give different answers to this question. In our 1° level taxonomy the most significant answers appear to be the following:

- (a) *experience* ("empiricism")
- (b) *reason* ("radical rationalism")
- (c) *reason together with experience* ("critical rationalism")
- (d) *historical reason together with experience* ("weberian" approach)
- (e) *human empathy with historical reality* ("hermeneutic" approach)

Of course each approach has many internal specifications since there is no outstanding scholar who has not elaborated his own original approach and which should therefore, strictly speaking, occupy a single and exclusive box in our taxonomic system. Obvious reasons of simplicity lead us to regroup different authors into a single box. Consequently, the denominations of the individual approaches are regarded as useful in order to define a certain approach without the proposed denomination being assigned an absolute value. We intentionally refer with quotation marks to the approaches outlined in the prior illustration. Herewith following we eliminate the quotation marks for simplicity, but it is understood that these labels have purely heuristic valence

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<sup>7</sup> The concept of paradigm entered the epistemological vocabulary through the work of Khun (1962).

also because the individual approaches evolved over a long period of time and have gone through a multiplicity of adjustments that in this context are impossible to account for. However, within a framework that has known numerous and profound changes, some fundamental differences remain that justify both combining them in the extended categories indicated here with the term "approach" and using corresponding labels as a distinction of the approaches. A particularly relevant aspect, which we return to later, is that these approaches in some cases are thought of as relevant to all the sciences (natural and social) without distinction, in other cases, a certain approach is instead focused on either only the natural or only the social sciences. For example, the empiricist approach was born in the XVI Century, that is to say, a period when only natural sciences were considered. The social sciences were either not taken into account or were subject to reductionism<sup>8</sup> that assimilated them, ultimately, to natural events. For instance, in a mechanistic version of science there is no need to distinguish between natural science and social science by the simple fact that the latter is reduced to manifestations of the first.

Finally, we stress that our intention is not to express an opinion of the validity of the considered approaches. We are interested in defining as correctly as possible the essential aspects of each peculiar epistemological approach, and in linking it to the corresponding economic paradigm and thereafter to a particular framework of marketing problematics in literature. In other words, we are trying to characterize the contributions of marketing through the search of the *fil rouge* that links them to its parent epistemological methodology and a certain economic approach, regarded as the framework within which the individual marketing contributions acquire concreteness.

## **2.2 *Nomothetic science and historical sciences***

Before turning to the presentation of the proposed taxonomy, it is necessary to clarify the important division of sciences in function of the epistemological approaches that may be assigned them by scholars. This distinction concerns *nomothetic* and *historical* sciences. The distinction stems from the fact that traditionally the assertion of science in western thought was inspired by the distinction between the subject (who investigates) and the object (to be investigated). This distinction was viewed as necessary to conceive genuine knowledge, i.e. scientific knowledge as based on a clear distinction between subject and object. The subject, respecting certain rules of

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<sup>8</sup> For a detailed analysis of trends in reductionist science, see Piaget (1970).

investigation, could carry out a study of the object without being influenced by its own opinions, insuring the validity of the proceedings. A validity that could also be demonstrated by a repetition of the investigation-experiment by other parties, thereby assuring an intersubjective verification of the results of scientific analysis. Furthermore, the distinction between subject and object presumes that the results that emerge from scientific analysis refers to "rules" intended as quantitative relations, invariant in time and space. The lives of objects are independent from the analysis of the subject. The nomothetic discipline is therefore configured as a system of hypotheses that, if objectively confirmed, turn into a system of laws of universal value<sup>9</sup>. It goes without saying that natural sciences are conceived as typically nomothetic and that the successes achieved in these disciplines were considered significant enough to profoundly affect the way of seeing these sciences and thus becoming the point of reference for all other disciplines. The social sciences also tended initially to be built on the nomothetic structure. Certainly, economics, in view of its typical quantitative curvature, is set according to these canons, and similarly, sociology in Auguste Comte's positivistic approach. However, Marxist criticism of political economy and the German historicistic philosophical thought (following the Romantic Movement) emphasized how the social sciences cannot be framed in a nomothetic approach and by their very nature should be constructed on a necessary connection with history. This debate, which began in the second half of the XIX century, is still going on today. We mention it just to remember that there are a multitude of positions assumed by the various schools of thought in this field.

### **2.3 *The empiricist approach***

With reference to point (a) those who rely on experience as a source of exclusive knowledge are usually seen as belonging to the family of *empiricism*. It assumes that experience is both the exclusive source of knowledge and the means of validation of a theory. Thinkers who should be regarded as among the most important initiators of this school are: Francis Bacon (1561-1626), Galileo Galilei (1564-1642), John Locke (1632-1704) and David Hume (1711-1776). Among the salient characterizations of this school is the assumption that the truths that man can access are based on the senses and are therefore understandable only through experience.

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<sup>9</sup> Aron (1967): "The particular process of the natural sciences is to consider the general characteristics of the phenomena and to establish regular and necessary relations between them. It tends to build a system of laws or relations that are always more general and as far as is possible of a mathematical nature. Newtonian physics is natural science's ideal model"



Similarly, the mind is seen as a kind of "tabula rasa" or "blank slate"<sup>10</sup> that in time is filled with knowledge acquired through experience. This approach therefore favors knowledge that can be acquired through evidence derived from experiments. Another characteristic aspect of this approach consists in the knowledge gained as an "a posteriori" result and then confronted with knowledge gained "a priori" which had a wide following in continental Europe starting from Descartes and took particular root in German philosophy from Kant (1724-1804) onwards. The search for a viable theory according to empiricism favors induction. *Inductivism* is based on the thought that scientific theories are essentially the generalization of observed data, in the sense that they are based on a widespread generalization of a large number of concurred observations. This approach, which can be traced back to Francis Bacon and which received the powerful endorsement of Isaac Newton, is also the basis of probabilistic validation of a theory. The initial inductive position was attenuated by scholars who continued to recognize themselves in the empiricism passing from *tout court* inductivism to probabilistic inductivism<sup>11</sup>. This approach is also characterized by methodological atomism, in the sense that what can be investigated are individual "things", the individual elements of the reality. In more radical versions of empiricism, all authentic knowledge falls within the framework of science and every other form of belief is none other than a subjective view of an irrelevant assumption (metaphysical). The early version of Political Economy (Smith, Ricardo and Marx) and the following anglo-saxon economic tradition (from Stuart Mill to Alfred Marshall) can be classified as leading member of empiricism.

#### **2.4 The radical rationalism**

Another distinct epistemological stance opposed to empiricism is the radical rationalism<sup>12</sup> traditionally traced back to Descartes (1596-1650), according to which, reason is the source of knowledge and provides access to the truth through speculation. Human reason is innate and

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<sup>10</sup> This characterization, which was emphasized by John Locke, is to be seen especially as an opposition both to Scholastic philosophy which tended to assume that man had innate ideas (innatism) as well as the Cartesian rationalism that takes reason as the yardstick of truth rather than experience.

<sup>11</sup> We recall that, as a result of subsequent epistemological criticism, the initial inductivism position was attenuated. According to Bertrand Russell, induction is necessary to science, but not infallible. Induction can never demonstrate the truth of theories, but only increase their probability. Consequently, faith in induction depends on our subjective belief and is therefore not scientifically demonstrable. Russell (1912).

<sup>12</sup> Some authors, intending to express a judgment of the scientific validity of these approaches, speak of dogmatic rationalism. See for example Goldman (1945). However, we recall again, the research we propose is targeted at the presentation of the approaches and has sought to use labels that do not imply evaluative judgments.

independent of experience. It uses data of experience as materials that are useful to exercise reason, but it is only reason that is able to express the laws of nature using mathematical language. This definition was further strengthened in the subsequent developments of Baruch Spinoza (1632-1677) and Gottfried Wilhelm Leibniz (1646-1716). By starting out from fundamental principles that are intuitively identifiable, it is possible, through a deductive process, to arrive at knowledge. Leibniz thought that in principle, all knowledge, including scientific knowledge, could be achieved only by using reason, although recognizing that in practice this was not feasible due to the limitations of every human being. While rationalism exalts the power of reason to develop knowledge from itself, empiricism states that reason is powerless when it prescind from data provided by experience. The characterization of the radical rationalism is based on the assumption that it is possible to know reality through the thought using intellectual principles. According to Descartes and Leibniz knowledge must be based on *a priori* principles.

Of course, the rationalistic framework is very articulate and includes different positions, in part derived from the development of these first positions, in function of the progress of natural sciences, in part derived also from the cultural specificities of different philosophers. Of interest to us, among the aspects of the radical rationalism applied to science, is the deductivist approach. Assuming some premises that intuition judges as true, called axioms, as is the case in geometry, then it is possible to draw some necessary conclusions that have the same degree of truth as the premises. For those who recognize themselves in it, such radical rationalism has the merit of assuming the knowledge of universal truth. It is about stable certainties, based on the closed and self-sufficient interiority of a logical-mathematical language. This approach appears to show significant affinity with the marginalist economics of the Lausanne school<sup>13</sup> that further represents the economic majority paradigm and is therefore of great importance to our taxonomic proposal.

Whilst France had *le siècle des Lumières* as a further development of the *démarche cartésienne*, Germany had a double phase, that of Romanticism, where history is seen as the manifestation of an absolute principle of the realization of man's destiny, and that of Kant's

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<sup>13</sup> The Lausanne school, whose best-known representatives are Leon Walras (1834-1910) and Wilfredo Pareto (1848-1923), is opposed to the decidedly more empirical approach of Alfred Marshall (1842-1924). While for Marshall adherence to the reality of the descriptive hypotheses of their models (the analysis of partial equilibrium is typical) are a prime concern, for the members of the Lausanne school, analysis of general economic equilibrium can be disengaged from realistic hypotheses in order to get to a sort of "essence" of the economic facts (pure economics) that represent the "axioms" from which to develop the deductive chains that lead to the analysis of markets' functioning and identification of their respective equilibria.

critique. In the Enlightenment<sup>14</sup> the centre of gravity of knowledge is still represented by reason, but the concept of reason is more modest than the Cartesian one and experience also plays an important role to express a philosophy of history oriented to progress and to the overcoming of the most direct human needs. Romanticism instead denied any value to experience and nomothetic sciences because they cannot give the absolute truth sought by the romantic movement that entirely relied on an infinite and omnipotent reason expressed in history that dominates and constitutes the unity of the world. This transcendent reason is a spiritual force that manifests itself in history and that can be perceived because it is embedded in history<sup>15</sup>. It is difficult to imagine anything further from empiricism than romanticism. Given its characterization in a metaphysical sense, romanticism also seems distant from radical rationalism. However, the point of arrival of these two visions is quite similar in that they are representative of the possibility to reach an understanding of things in themselves, an understanding of the absolute essence of things. In the case of radical rationalism, we move to an objective understanding represented by the mathematization of the reality intended as a mechanic system. In the case of romanticism instead, attainment of the absolute occurs, represented by the concurrence of the universal and the individual, when we move to the recognition of the organic connection of an infinite multiplicity of historical phenomena as summarized in the philosophy of history (historicism). In this sense Romanticism has a very important role because it places the historical process at the center of its speculations. An analysis that will be resumed later, although with a characterization decidedly distinct from the hermeneutic school on which we will focus shortly.

## **2.5 *The critical rationalism***

The work of Immanuel Kant, who we here see as the initiator of the approach denoted as critical rationalism, is extremely vast. We focus our attention on the more epistemological aspects that seem of particular importance to us. Kant is accredited with having problematized the limits of knowledge attainable with empiricism. After years of careful study of Hume's work, the philosopher from Königsberg reached the conviction that empiricism (which Kant denotes as "atomistic") is not able to access true knowledge in that it cannot be constructed as a mere sum of

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<sup>14</sup> From Montesquieu to the exponents of *Encyclopédie*; Diderot and D'Alembert via Turgot and Condorcet.

<sup>15</sup> There is also a side of romanticism in which the infinity of the conscience is represented by feelings. In this opposite version, harshly criticized by G. W. F. Hegel (1770-1831) as an exponent of "rational" romanticism, feelings represent the infinite form and reveal themselves better in art than in philosophy.

observations and single assertions. It is necessary that these should be structured in a more inclusive system, essential to give precise and specific meanings to the single facts incorporated by experience. It is interesting to note that Kant's approach, which we have labeled as critical rationalism, underpins the framework of the nomothetic sciences but develops a critique of particular importance on the empiricist approach and poses a dialectic between the "totality" of the world and the single "fact" that must be solved to build truly scientific knowledge. For Kant, the possibility that humans have to communicate and agree in the general categories of thought, requires a common sharing represented by synthetic *a priori* judgments. According to Kant, empiricism, which in economics assumes Benthamian utilitarianism, does not have access to knowledge as it is self-confined in an atomism that sees only the parts and not the whole<sup>16</sup>. Kant wanted to distance himself also from the position that we have indicated as radical rationalism (and which to Kant seemed dogmatic rationalism) which presumes being able to attain knowledge of the absolute through reason<sup>17</sup>.

The role of Kant is of particular interest to our taxonomy in that placing the problematic relation between the totality and its parts foreshadowed subsequent epistemological positions of relevant interest such as those developed in Gestalt Psychology (Piaget 1970), Structuralism (Piaget 1968), the Theory of Systems (Von Bertalanffy 1969), the Postmodern Thought (Lyotard 1984) and the Thought of Complexity (Luhmann 1984 and Morin 2005). As far as it concerns economic theory the critical rationalism is close to "New Austrian School" of von Mises and von Hayeck.

## **2.6 The Weberian approach**

Max Weber's (1834-1910) vision was developed with specific reference to social sciences, and specifically to sociology, Weber assumes for Sociology the research of general laws but restricted to a specific period of time because any social science cannot evade intersubjective analysis and the findings of experience. He matured his approach through the development of a

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<sup>16</sup> This kind of argument was stimulated by a multiplicity of subsequent elaborations moving from philosophy to the social sciences and sociology in particular. Consider, for example, this piece by Adorno (1969) "The theoretical reflections on society as a whole may not be entirely replaced by empiricist investigations, tending to escape from them, as spirits do in parapsychological experiments. Every vision of society in its entirety necessarily transcends its scattered facts. The construction of the totality has as its first condition a concept of things on the basis of which to organize the disparate data".

<sup>17</sup> The readings of Kant's thought are numerous and often divergent. The analysis carried out by Goldmann (1945) seemed particularly acute to us.

synthesis that on the one hand, does not fall alongside the sociological positivism drawn up by August Comte (1798-1857) and further developed (according to a less radical positivism) by Émile Durkheim (1858-1917), but which, on the other hand, does not end up adhering to a romantic approach in which the knowledge in a social science automatically derives from the social nature of man. His entire methodological elaboration is centered on the problem of how to achieve a nomothetic scientific development constructed with reference to general laws that do not disregard history. To Weber, sociology is neither a simple auxiliary discipline of historical sciences nor a science that is legitimated through the recourse to laws of absolute value. The solution is to be sought in the construction of scientific knowledge that is empirically verifiable and characterized by a general meaning but with reference to a precise historical context. Weber considered the vision of the world and the concept of science developed from positivism to have failed since the subsequent realities in which man lives (feudalism, capitalism, etc.) represent profoundly different historical-cultural realities that cannot be reprised or reconducted within universal laws. It is nevertheless necessary to remain faithful to the principle that founds the validity of scientific affirmations not based on over-empiricist presuppositions, as is the case in historicism, but on empirically demonstrable data. Weber's synthesis came about through a unification of the three stages of scientific work: empirical research, theoretical elaboration and generalized interpretation of the collective social formations. To Weber "cultural" sciences are as scientific as those termed "exact" and the relation to the values in human actions is the means with which to analyze objectively a cultural reality<sup>18</sup>. In historical or sociological sciences, intuition has a different function from that in natural sciences. The historical and sociological propositions concern observable facts, aimed at reaching a defined reality represented by the behavior of man in the meaning that the very same agents attribute to it. Every society has its own culture and the sociologist tries to understand how man has lived through the countless forms of existence that become intelligible only in the light of the system of beliefs and knowledge specific to the society considered. To construct the historical individuality of a given society, Weber proposes the use of the "ideal type" concept. In Max Weber's comprehensive sociology, the ideal type plays a role similar to the hypothetic-deductive model used in the nomothetic sciences, i.e. construction subjected to verification. It is "a conceptual framework that combines

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<sup>18</sup> Aron (1967).

certain relations and certain processes of historical life in a cosmos of conceptual connections, in itself devoid of contradictions"<sup>19</sup>.

The Weberian approach is characterized by the search for synthesis in the definition of the classification of the social sciences. A formulation that seems relevant to us in as much as it is the methodological root of a trend of institutional economic studies developed in various countries, but which probably had its most significant exponents in American *Institutionalism* - on which more later. It is important to stress that the Weberian approach, while denying the possibility of universal economic laws, does not recognized itself in the German historical school which Schumpeter subdivided into the "old", represented by Bruno Hildebrand (1812-1878), Wilhelm Roscher (1817-1894) and Karl Knies (1821-1898), and the "new" historical school of Gustav Schmoller (1838-1917). The approach of the historical school, and in particular, that typified by Schmoller, is summarized by Schumpeter in this way: "Schmoller always protested against an <isolation> analysis of economic phenomena – he and his followers talked [referring to the neo-classical economy of a nomothetic structure] of the <isolation method> and claimed that we lose their essence as soon as we isolate them. This opinion, of course, was simply the result of their intention to nurture the economy exclusively with historical monographs. [...] Nothing in the cosmos or in social chaos really remains outside of the Schmollerian economy. In principle, if not entirely in practice, the Schmollerian economist was in fact a sociologist with a historicist mentality in the widest meaning of the term"<sup>20</sup>.

Schumpeter classifies Weber as an exponent of the "very young" historicist school together with Werner Sombart (1863-1941). However, it should be noted, as Schumpeter himself declared in the History of Economic Analysis "our interest in methodology as such is only limited" and he fails to highlight the important methodological differences between the historicist school of strict historic-idealistic observance and Weber's position.

## **2.7 The hermeneutic approach**

Before trying to characterize this school, it should be noted that the first three approaches essentially have as a reference the natural sciences where the search for universal and ahistorical

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<sup>19</sup> Weber (1922).

<sup>20</sup> Schumpeter (1954).

laws is expected<sup>21</sup>. In other words, both empiricism and rationalism depart from the idea of a single science to which either the induction or the deduction principles are applied, but both pursue the objective of generalization, or rather the search for applicable laws to a multiplicity of situations and moments. The measure of the validity or, if preferred, of the hierarchy of a law is given by its own degree of generalization. The more general a law is (in the sense that it had general validity) the higher is its rank<sup>22</sup> within the scientific framework. Therefore, failing to define and validate highly general laws in the realm of social sciences, meant that social sciences were positioned on a lower rank than the natural laws. Nevertheless, according to an approach that intends to implement a nomothetic program also for the social sciences, social scientists must deal with the "social facts" considered as things that can be subjected to positive analysis through the same methodology used in the natural sciences. The typical exponent of this reductionist program in social sciences, and specifically in sociology, is Auguste Comte (1798-1857). He speaks explicitly of sociology intended as "socio-physical" in that it is constructed with laws similar to those of the physical world<sup>23</sup> and targeted at the study of social behavior that can be defined in terms of manifested, observable and physically ascertainable actions. This program seemed extremely radical and unacceptable to an idealistic cultural tradition such as the German one, which tended to interpret not only history, but also the world, according to a historicist perspective. It is not surprising therefore, that in the German-speaking world there was, we could say almost in reaction, a strong reaffirmation of historicism in the definition of the methodological statute of the social sciences, thanks also to the fact that the positivist scientific program, in Comte's formulation, appeared to be denoted by significant weaknesses. The historical school of economics, as previously mentioned, can effectively be seen as the attempt to give a historic answer to the construction of a methodology to be applied to the social sciences. However, if Comte's positivism was unbalanced on the one hand, then on the other so was Hildebrand and Schmoller's historicist school. Both because applied to economics, that is to say, to the social sciences for which the search for universal laws then seemed more justified with respect to

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<sup>21</sup> This connotation is certainly a little too coarse with reference to the critical rationalist approach. However, there is no doubt that as regards Kant, the objective to beat was empiricist atomism and Benthamian utilitarianism and, secondly, at his time social sciences were still treated with a reductionist and mechanistical view.

<sup>22</sup> Marsonet (2005).

<sup>23</sup> In this respect, we also note that years later, in the XX century, "physical economics" is spoken of. In Italy, an exponent of this approach is Palomba (1948), more recently instead "econophysics" is spoken of. In France LaRouche (1998) proposed a re-edition of physical economics. See also Mirowski (1989).

sociology for example, and because the historicist program would have needed a powerful methodology to counter the then prevailing marginalist school, which its exponents instead did not affront, unlike Weber with particular reference to sociology. The historicist school was also left open to significant criticism that did not fail to arrive from German economists who could also argue with the neoclassic economists on specific points, but who fully recognized the need to preserve the nomothetic statute to economics. This is how the famous "strife over methods" (*Methodenstreit*) came about which saw the Austrian economists Carl Menger and Böhm-Bawerk<sup>24</sup> marshal against economic historicism.

The hermeneutic approach in turn can be seen as an effort by the German culture to elaborate a response against the "alleged objective knowledge of science". A program that found undoubted nurturing in the crisis that traversed the economic and social nomothetic thought in the first half of the 20th century, traversed by two world wars and the solidity of the laws of economic science deeply shaken by the crisis of the late 1920s in the USA, but then extending to the whole western economy. The hermeneutic school traces a clear distinction between natural and social sciences and is only concerned by the latter. A peculiar feature of social sciences is that they may not be reduced to facts (even if social ones) in that those same facts, when placed in different contexts assume, or can assume, completely different meanings. According to Hans Georg Gadamer (1900-2002), the most representative figure of the hermeneutic approach<sup>25</sup>, social sciences and natural sciences are radically different, since the first inevitably depend on the interpretative process – typically human – of the significant behavior and of the social practices on which such behavior is based. In other words, natural science holds with causal objective processes, while the social sciences concern significant activities and practices. Only the causal processes may be explained and described objectively; human activities and practices require interpretation and understanding. In summary, the explanation is the objective of the natural sciences while understanding is the aim of the social sciences<sup>26</sup>.

The hermeneutic problem (intended as a theory of interpretation of classical texts) had already been dealt with by Friedrich Schleiermacher (1768-1834), who, however, had a vision of hermeneutics that was still a long way off from the traits that it assumed with Gadamer. While for

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<sup>24</sup> See for example Böhm-Bawerk (1890).

<sup>25</sup> Gadamer had numerous precursors in the context of historicism, among these, the most important was probably Dilthey (1833-1911), while Schleiermacher (1768-1834) had already used the term "hermeneutic".

<sup>26</sup> Gadamer (1972) and Marsonet (2005).



the former, hermeneutics allowed understanding the text of an author in the most authentic way possible, through a return to the past that allowed reliving the historical basis on the presupposition of the text examined, for the latter this operation was not feasible because of the impossibility to return to the past in an objective way, since the present and contingent existence of man is the place where a pre-understanding is necessarily formed (stratified knowledge that characterizes the understanding of a present state) of the reality that will also necessarily contaminate the idea of the past. For Gadamer it is therefore impossible to return objectively to the past, as this generates necessarily a pre-understanding that makes the vision of the past something different from the past itself. This is how a hermeneutic circle<sup>27</sup> is formed: the understanding of a historical text is conditioned by a pre-understanding, which is determined by all relations of understanding and pre-understanding from the past. The understanding of a historic moment, therefore, is the result of this unceasing circular stratification of concepts that constantly form on themselves, starting from the preceding concepts.

We have therefore arrived at a completely antithetical position to empiricism. In the social sciences, according to Gadamer's approach, human reason is not a *tabula rasa*, on the contrary, it is a *tabula plena*, full of pre-judgments (in the sense of judgments that precede a careful analysis of social issues to be analyzed) that may result as justified or unjustified in subsequent analysis, but which are nevertheless not eliminable and the necessary medium through which the individual is connected to the social totality. If in atomism there are first the facts, which must be kept rigorously separate from interpretations, in the hermeneutic view of social sciences this separation is totally illusory as stated by Friedrich Nietzsche's (1844-1900) assertion: "against positivism, which stops at the phenomena <there are only facts> - I should say: no, actually there are no facts but only interpretations"<sup>28</sup>. As seen in the hermeneutic approach, we have a re-proposition of questions already raised by Kant on the relationship between "form and content" or between "totality and its parts", but here the synthesis is profoundly different in that it is totality that gives meaning to the parts, a position that also recalls some of the structuralism and functionalism positions.

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<sup>27</sup> In the introduction to *Verità e Metodo*, Vattimo, drawing up a short summary of the hermeneutic circle in the history of philosophy, specifies that "In its simplest form the hermeneutic circle means that the parts of a text can only be understood in the light of the whole, but the whole can be understood only in light of the parts". Vattimo (1983).

<sup>28</sup> Referred to by Foriero (1993).

### 3. The level of the economic theory

#### 3.1. *From Political Economy to Economics*

The 2nd level taxonomic classification, that of economic theory, can be usefully formulated starting out from the relationship of the various economic paradigms with the natural sciences. Economics, but also law, sociology, anthropology, psychology, etc., must therefore define its own field in relation, on the one hand, to the natural sciences and, on the other, to history. Assimilating economics to natural sciences means assuming an economic science that aims at a universalistic program where history is an accident. In this perspective, if economics wants to be a science, on par with the natural sciences, it must get rid of history to point to forms of knowledge that have universal validity. If instead the choice is in favor of marking a distance between natural and social sciences, the necessity to build new criteria of epistemological coherence for the social sciences becomes clear.

Initially economics was born as *political economy* and this distinction means that the perspective in which to place the reflections of the first economists tends to frame this science within a socially and historically determined framework. *An Inquiry into the Nature and Causes of the Wealth of Nations* by Adam Smith (1732-1790) was published in 1776 and, strictly speaking, falls much more within a legal and social than scientific framework. This approach was also maintained by subsequent classical authors such as David Ricardo (1772-1823) and further emphasized by Karl Marx (1818-1883). However, we can say that due to the effect of Marxist criticism, liberal economists were gradually inclined to mute the image and the name of Political Economy as a social science in order to highlight the nomothetic aspects of their research, which meant a shift in the labels (but not only) from Political Economy to Economics. To John Stuart Mill (1806-1873) this tendency seemed clear, for example he privileged a social science approach as regards aspects of the distribution of wealth and a natural science approach to the issues of production of wealth. From the methodological point of view, Mill distances himself from rigid empiricism, both for the specificity of economic problems and because utilitarianism of man is knowable by the researcher involved in the subject of human feelings through psychological introspection. It is interesting that Mill is credited as the first theorizer of *homo economicus*, even though he used neither this label nor the more common Anglo-Saxon *economic man*<sup>29</sup>. However

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<sup>29</sup> According to Persky (1995), the first use of the term *economic man* goes back to a J. K. Ingram publication, *A History of Political Economy*, 1888, the *Homo economicus* label instead spread with Pareto's use in 1906 in his political economy manual.

in Mill (1835), economic man is clearly indicated as a useful abstraction assumed by political economy through an arbitrary definition that considers this aspect as relevant only for the purposes of utilitarian behavior: “A being who inevitably does that by which he may obtain the greatest amount of necessities, conveniences, and luxuries, with the smallest quantity of labour and physical self-denial with which they can be obtained in the existing state of knowledge”. It was through the Lausanne school that the concept of economic man became the cornerstone of the construction of *pure economics*, which we will shortly resume.

Another particularly significant aspect of Mill’s position concerns the complexity of economic phenomena that he considers "hidden" by a myriad of accidental aspects. It is therefore necessary to dig deep in order to discover the true causes of economic phenomena. Mill (1936) argued that the complexity of the economic reality should be investigated through a process of organization of research into disciplines and sub-disciplines and furthermore, considering a specific issue, that it needs to be dealt with first through an analysis that breaks down the individual problem into its more simple components, followed by a process of synthesis that recomposes the overall framework: “When an effect depends upon a concurrence of causes, those causes must be studied one at a time, and their laws separately investigated, if we wish, through the causes, to obtain the power of either predicting or controlling the effect since the law of the effect, is compounded of the laws of all the causes which determine it”.

Returning to the methodological approaches already summarized, we can state that Mill’s position is characterized by a rather tempered empiricism. He adopted, as it was natural in the Anglo-Saxon culture of the time, a nomothetic vision of economics, but his recall to the complexity and the intertwining of the economic contributory causes on a single effect shows that he in some way intended to take account of a complex socio-economic reality but naturally he shrinks from the idea of totality, evoked in some way by radical rationalism, and emphasized above all by critical rationalism. Also because Mill assumes that the disaggregation and consolidation of contributory causes of economic phenomena can be made on an additive basis<sup>30</sup> (the whole is equal to the sum of the parts). At the same time, it is clear that Mill preferred an approach that privileges adherence of the theory to the economic reality. Abstraction is necessary but entails a simplification of the reality that should be recomposed, if wanting to reach a genuine explanation of the functioning of the system, not just economic but also social. Indeed, Mill

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<sup>30</sup> Guala (2002).

conceived a social superscience that he called "*ethnology*" whose task was to summarize in a single theoretical framework the scientific theories developed in the different social disciplines: economics, political science, morality science, science of religion, etc<sup>31</sup>. Mill's approach could be seen as the approach of reference, under an epistemological profile, of Anglo-Saxon economic thought, both of Jevons "first" marginalism, but also that of Marshall, for whom unlike marginalism and especially that of the Lausanne school, the concept of *homo economicus* was at most only a reference and the adherence to reality of the assumptions in economic models was a precise stronghold to maintain.

In the second half of the XIX century, economic research began to differentiate between that professed in the Anglo-Saxon world and that professed in continental Europe. In the first case, it tended to maintain an "applied" approach based on theories that seek to minimize the process of abstraction and simplification of reality to construct theories that maintain the maximum degree of adherence to the economic reality as perceived by normal subjects in their daily normal economic practice. In continental research, especially due to the effect of Walras' and then Pareto's work in search of "pure economics", that is to say, divested of all the daily accidents to try to find the essence of economics: the pure version of the economic mechanisms that only in this form may take the structure of universal scientific laws. In the Lausanne School vision's, the option in favor of pure economics is also legitimated by the possibility to use the language of mathematicians in a much wider sense, since the framework of reference is stripped of every phenomenon considered secondary. Against this, in Anglo-Saxon economic vision's maintained in the first part of the XX century by Alfred Marshall (1842-1924), the mathematical instrument was a tool that could only be usefully for formal verifications, but Marshall himself recommended be eliminated from reasoning and from the economic description to remain as close as possible to the everyday economic language and experience. At the same time, Marshall had a more limited perspective in his analysis (partial equilibrium) because he intended to attain the characterization of the complex economic mechanism as the sum of markets, each of which is characterized by its own real specificity.

Instead, the particular curvature of the analysis carried out by Walras aimed at the simultaneous co-determination of the equilibrium not only of a single market, but also of an entire economic system. This type of formal solution appears not only rigorous from the point of view

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<sup>31</sup> Ward (1891).

of its internal structure, but also elegant, in that it is conceptually simple and at the same time general. It appears especially politically correct from the perspective of a capitalist economy that theorizes the possibility to attain a configuration of equilibrium and maximum efficiency in every market. It seemed the definitive answer to the criticisms of Marxist derivations and knew lasting success that was to be questioned only by the analyses of the oligopolistic market structures<sup>32</sup>, but especially by the economic crisis of 1929.

This approach seems substantially faithful in pursuing the assumptions of radical rationalism. The economic system is comparable in its pure form to a complexity of legislation having the same cogency as natural laws<sup>33</sup>. Towards the end of the XIX century, the legitimacy of economics as a nomothetic science implies a new term: from *Political Economy* to *Economics*, by taking on an analytic-deductive definition that expunges historical references in order to find "pure", "general" and "universal" laws. It is interesting to note how this construction prescind from any empirical verification, both because reality is something that follows the laws of pure economics only in the trend, superimposing a multiplicity of accidental phenomena on them and because it is, in essence, an axiomatic construction that is validated by mathematical calculation and by a criterion of internal consistency. This new perspectives requires therefore, even if undeclared, to eliminate as over-structural and non-determinant everything that would in fact make it impossible to proceed with a determination of market equilibria (price and quantity exchanged for each market). The calculation of equilibrium thus becomes the tendential point of arrival of each market if it were left free to operate reproducing a perfectly competitive situation everywhere.

In part this curvature of economic thought was formed by the search for a completely scientific economics statute that guaranteed its authority in a similar manner to the natural sciences, but also as a reaction to contrary types of economic settings, developed particularly in Germany and Austria, where a historicist orientation prevailed, ideologically adverse to empiricism and especially to positivism, but just as unbalanced as them. Suffice to say that, according to this historicist approach, political economy, as a moral science, should not have

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<sup>32</sup> We refer in particular to the work proposed in *Monopolistic Competition* by Edward H Chamberlin (1933) and in *Imperfect Competition* by Joan Robinson (1933).

<sup>33</sup> There are economists who speak of *physical economics* to confirm the homogeneity link between the natural and economic sciences and Auguste Walras, father of Leon Walras also an economist, in a letter to his son underlined that "We must devote ourselves to economy policy in the same way as one would be dedicated to acoustics or mechanics" Leroy (1923).

conceded to the mathematical language. A second conditioning aspect stemmed from the attitude of the other sciences towards economics. Consider, for example, that even scholars of the highest level, such as Benedetto Croce (1866-1952) in Italy, refused to accept the status of "science" for economics on the basis of a historicist principle. It was therefore quite inevitable that to these historicist positions other were placed in opposition by "pure" economists. For example, Vilfredo Pareto (1848-1923), Leon Walras' successor to the chair of political economy in Lausanne, in direct controversy with Croce, defined the new economy as "rational mechanics" where logical coherence and formal rigor of analysis prevail through a wide use of the mathematical tool<sup>34</sup>. Leon Walras also, in what was probably his last scientific contribution, traced a close parallel between economics and mechanics<sup>35</sup>. Basically, today we also have the distinction between "applied" and "pure" economics, even if these two labels are no longer used, the first includes the majority of the approaches adopted in microeconomics and in industrial economics, while the second tends to converge in the majority of studies of mathematical economics and econometrics.

### 3.2. *The Chicago School*

There are of course many other formulations and amongst these, the approach of the Chicago school must be pointed out. Particularly representative of this approach is Milton Friedman (1912-2006) who also studied specific epistemological issues<sup>36</sup>. Friedman can be considered an exponent of a typically empiricist approach, in a certain sense an even more radical empiricist than the empiricist economists of the 19th century such as Mill and Marshall. The position of Friedman may be summarized by reference to three aspects, a) firstly Friedman was a strong supporter of the rational behavior of actors, the concept of *homo economicus* not only has the heuristic function of tracing the behavior of a subject, if put in the position of being able to make a decision in a rational sense, but represents an interpretative stronghold of his approach and a faithful description of the human behavior. Many of his arguments against economists who supported an alternative position were oriented to demonstrating the rational behavior of subjects even in the face of behavior that others judge to be economically clearly irrational; b) the second aspect concerns the validation of economic theories on the sole basis of their predictive capacity.

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<sup>34</sup> Faucci (2000).

<sup>35</sup> Walras (1909), "Économique et Mécanique".

<sup>36</sup> Consider for example his essay: *The Methodology of Positive Economics* (1953).

In this sense, value is denied to the realism of the assumptions in the definition of a theory<sup>37</sup>. Finally c), where it should be indicated, in close connection to the previous point, that the devaluation of realism of hypotheses places Friedman among "instrumentalists", i.e. among those who deny the possibility that science can and should devote itself to discovering the true structure (natural and social) of the world. Theories are only useful instruments to interpret the world and to make forecasts on future events<sup>38</sup>.

### 3.3. *Macroeconomics*

The methodological positions of pure economics were generally abandoned with the constitution of the macroeconomic body of studies developed by John Maynard Keynes (1883-1946). Keynes substantially maintained the methodological attitude of Mill and Marshall as regards the concreteness of analysis but applied to economic categories of an aggregate nature, considering not so much the choices of a single individual, but the aggregate effect of choices of entire categories of subjects. Collective subjects of the classic economist and Marxist elaborations were not considered (the classes, the capitalists, the proletarians, etc.) but rather the aggregate consumption, the aggregate investment, and the aggregate savings. This elaboration constituted an attempt to reconsider economic science following the effects of the great crisis of the 1930's, which seriously undermined economic science's image<sup>39</sup>. The basic objective therefore changed, it was no longer about the determination of the configurations of market equilibria, given the economic events that had destroyed the equilibrium myth, but an attempt to investigate the conditions necessary for the growth of the economic system and the reduction of unemployment. The prestige of macroeconomic studies arising from Keynes' contributions and from the successes connected to the public intervention aimed at economic development and the fight against unemployment had not so much the role of affirming a new methodological paradigm, but rather to set aside the scientific program of pure economics, reaffirming the traditional Anglo-Saxon approach.

### 3.4. *Praxeology*

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<sup>37</sup> "The only relevant test of the *validity* of a hypothesis is comparison of its predictions with experience" Friedman (1953).

<sup>38</sup> Guala (2002).

<sup>39</sup> Consider that his most important work *The general theory of employment, interest and money*, is dated 1936.

In a contemporary phase with the emergence of macroeconomics in continental Europe, a new Austrian school emerged and especially the contributions offered by Ludwig von Mises (1881-1973). During his economic training phase, this scholar experienced the harsh conflict of positions represented by the *Methodenstreit* that saw the confrontation between scholars of the nomothetic method and scholars of the historicist approach. His own approach was in line with the first vein although with some autonomous and original developments. On the one hand, he claimed the need for an exclusively deductive approach, drawing him close to the previous exponents of pure economics, but he vehemently denied that economics was looking to be accredited in direct contiguity with the natural sciences: "On the one side he warned that the theoretical considerations were of utmost importance for science and for economics and by emphasizing deduction, he intended to ensure that it would not be forgotten; on the other hand, the attempts by economists to imitate the physical sciences irritated him. He wanted to strenuously conserve theoretical autonomy of the social sciences and a deductively oriented methodology would have prevented quantitative techniques (the use of which Mises saw as an attempt to ape the natural sciences) from earning too much space within economic science"<sup>40</sup>.

However, it should be noted that von Mises' approach had a strong point of contact with the approach previously indicated as *pure economics* and with the radical rationalist approach, since he assigned a fundamental role to *a priori* judgment: "The knowledge obtained from purely deductive reasoning is also creative and opens the mind to previously precluded fields". The significant task of *a priori* reasoning is, on the one hand, to highlight what is implicit in the various categories, conceptualizations and premises and, on the other, to demonstrate what they do not implicate"<sup>41</sup>.

But at the same time von Mises detached himself from radical rationalism, not only for the suspicion with which he judged the mathematical elaboration, as much as for the subsequent econometric developments, which from the 1940s onwards experienced a phase of particular development and prestige for its possible applications in the macroeconomic field. The most characteristic aspects of this orientation, for which the label "New Austrian School"<sup>42</sup> could also be used, was to define economics as an important discipline of the more vast praxeological

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<sup>40</sup> See Pheby (1988).

<sup>41</sup> von Mises (1966).

<sup>42</sup> Even if von Mises moved to the United States in 1940 where he produced the most significant part of his theoretical contributions.



science. Praxeology is the science that has as its task to explain human action in its various economic and social manifestations. The characteristic aspect of human action is that it is directed to a purpose. The purposes in themselves are not subject to investigation, but their attainment requires the use of means. Praxeology and its specialized branch: economics, is specifically oriented to the rational use of means. It follows that the behaviors of subjects are necessarily rational in the use of the means. Economics tells us nothing of the validity of purposes or the reasons of the action, but it is able to interpret the way in which human actions are embodied. This may seem to behold a return to pure economics but this is not the case because von Mises' economics takes account of: a) aspects neglected by the uncertainty that characterizes the reference horizon of subjects and b) the role played by the elapsing of time. This does not however imply entering into a historicist optic, since he denied any role to concepts such as "the spirit of the era" or "the climate of events" that are part of the baggage of the classic historicist approach to economics<sup>43</sup>. Friedrich HA. Von Hayek (1899-1992) carried on from Von Mises with some changes. He stressed particularly the methodological subjectivism of the Austrian approach and warned economists against the risk of an abuse of reason<sup>44</sup> that he ascribed to Cartesian radical rationalism and to the positivistic approach in general. He declared his adhesion to Popperian falsificationism<sup>45</sup>, so we can assume he represents an application in economics of the critical rationalism derived from the Kantian view.

We conclude this concise presentation of praxeology citing the fact that in the literature we also know a different version of praxeology that substantially coincided with studies started during the Second World War in the United States and listed as Operation Research<sup>46</sup>. In this field, the focus was also concentrated on more efficient use of means, but while in von Mises' praxeology, the study was intended to be of a positive nature, Operations Research's approach was typically normative and substantiated in a set of mathematical, statistical and econometric tools applied to the resolution of problems of choice. As can be seen, it was an approach that was completely antithetical to that theorized by von Mises and which falls instead into the von Neumann and Morgenstern (1944) subject of study.

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<sup>43</sup> There is considerable divergence among scholars concerning the possibility of entering Albert Friedrich von Hayek's development into the furrow of von Mises.

<sup>44</sup> Von Hayek (1952).

<sup>45</sup> Popper (1963, 1968).

<sup>46</sup> The term praxeology used in a homologous sense for Operations Research was used mainly in France in an effort to avoid Anglo-Saxon linguistics. See Caude and Moles (1964) and Kaufmann (1967).

### 3.5. *Bounded rationality and satisficing*

The Chicago school's and Milton Friedman's approach, with his fervent defense of the principle of rationality in behavior, although with a very different curvature from that of von Mises, did not fail to raise strong methodological objections from many economists. Among these opponents, Herbert A. Simon (1916-2001) played a leading role with his development of the *Bounded Rationality* approach. Simon claimed that there are no conditions for rational behavior for subjects in a situation characterized by uncertainty and incomplete information. The subject has teleological rationality objectives, some personal reading capacity of the environmental characteristics (cognitive limitations) and has developed over time, on the basis of past experience, some subjective expectations on the attainability of the objectives. From the moment that he is subjected to a series of constraints and stimuli from the environment in which he is immersed, he reacts with an interactive search for a solution (problem solving) that meets his expectations. This heuristic behavior foresees a downward or upward revision of expectations in the light of the results of the research process. The search ends when the expectations have been attained (*satisficing attitude*) without reaching a situation of optimization of choice because no conditions exists to do so.

Understanding this position gives of a much more social and psychological tinge to the economic behavior of subjects and while moving within a framework that stresses experience, the nomothetic valence fades away the significance of theories and ambitions to find "universal" laws without however entering into the "historicist school" perspective. Simon attacks supporters of perfect rationality and choice optimization criticizing the "determinism of situation": "The classic theory of omniscient rationality is individually simple and charming [...]. All the predictive power comes from having characterized the form of the environment in which the behavior takes place. The environment, combined with the assumptions of perfect rationality, completely determines the behavior"<sup>47</sup>. In this way, however, consideration of the different psychologies of actors and their cognitive capacity for analysis is neglected. Subjects may have different levels of propensity to risk, different systems of information gathering and different levels of expectations. It is therefore not possible to reason in terms of laws, but rather in terms of rules that must be classified according to concrete situations. We could say that for Simon and the great majority of

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<sup>47</sup> Simon (1985).

economists of the second half of the twentieth century, a sort of "weak thought" prevailed, based on hypothetical-deductive concatenations to be validated with the verification of experience<sup>48</sup>. This approach to research did not, however, produce "laws" as previously hoped for, but useful heuristic rules. These rules even if partial and imperfect, could be refined over time taking into account the development of historical situations. History was important, but a historicist view was rejected. Another aspect of particular importance of Simon's approach concerns the principle of rationality which still applied but which moved from optimizing rationality to procedural rationality. The players try to approach rationality teleologically, but they do so by applying rules of procedure applied to the objective of achieving a satisfactory result.

### 3.6. *American Institutionalism*

At the end of the XIX century, especially in the US, an anti-empiricist version of economics matured, which while rejecting a Marxist type approach did not scrimp on criticism of capitalism and in particular of American capitalism, whose predatory behavior, encouraged by a process of unprecedented monopolistic concentration in many key industries, was denounced. This approach, termed institutionalism (Institutional Economy) takes into account the economic behavior generated by a variety of phenomena with strong economic characterizations, such as the juridical sphere for example. Among the most important exponents of this approach are Thorstein Veblen (1857-1929) and John R. Commons (1862-1945). Their approach has divergent connotations that we however address with a single label in that both take the historic connotation of economic institutions fully into account and use a methodology that is decidedly alien from pure economic theories. Veblen's most noted work is his 1899: *The Theory of the Leisure Class: an Economic Study of Institutions*. Here we have an analysis inspired by evolutionary economics that characterizes Veblen's methodological approach which makes economic behavior derive not from forms of individual choice as coeval marginalism does, but from forms of social organization and therefore typically connoted in a historical sense. This aspect is especially stressed also in Commons' 1934: *Institutional Economics*. Commons is best known for developing an analysis of collective actions that take shape through institutions. In Commons' view, institutional economics added collective control of individual transactions to existing

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<sup>48</sup> In this elaboration, the point remains that purports keeping analyzed subject and object separate, namely "theories" and "facts".

economic theory: “Transactions intervene between the labor of the classic economists and the pleasures of the hedonic economists, simply because it is society that controls access to the forces of nature, and transactions are, not the ‘exchange of commodities’, but the alienation and acquisition, between individuals, of the rights of property and liberty created by society, which must therefore be negotiated between the parties concerned before labor can produce, or consumers can consume, or commodities be physically exchanged”<sup>49</sup>. The institutional approach can be considered an application of the Weberian view to economics. American Institutionalism represents an intermediate position between a nomothetic (astoric) concept of economics and the hermeneutic approach to economics followed by the Rhetoric approach.

### ***3.7. The rhetoric approach***

We conclude our review of epistemological positions by mentioning also the rhetoric approach (Rhetoric Economics) of Deirdre McCloskey (1983, 1988). The author points out that (fortunately, in his view) economists systematically go beyond the theoretical areas set by the epistemology that they declare to profess, because if indeed they were to keep to the rules dictated by empirical evidence they would have very few subjects to study and even less things to say<sup>50</sup>. Essentially, this recalls a sharp turn in economics that abandoned a nomothetic perspective (called by McClosky: “modernism”) to move to a historicist approach and to an analysis and exposition of theories in narrative terms. Without enlarging on the position of this author, we can say that this is clearly a hermeneutic approach that refuses a nomothetic scientific program for economics and assumes that economic models are metaphors. The right economic statement is the statement able to get the consensus of the people and the mean to do that is represented by rethoric.

## **4. The phenomenology of the marketing approaches**

### ***4.1. The disciplinary constitution of marketing***

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<sup>49</sup> Commons (1931).

<sup>50</sup> They claim to be arguing on grounds of certain limited matters of statistical inference, on grounds of positive economics, operationalism, behaviorism, and other positivistic enthusiasms of the 1930s and 1940s. They believe these are the only grounds for science but in their actual scientific work they argue about the aptness of scientific metaphors, the relevance of historical precedence, the persuasiveness of introspections, the power of authority, the charm of symmetry, the claims of morality. Crude positivism labels such issues “meaningless” or “non-scientific” or “just matters of opinion”. McCloskey (1983).

It is not easy to identify a historic moment or a date to which to ascribe the birth of marketing, essentially due to the heterogeneity of content that this discipline presents. Today we are accustomed to thinking of marketing as a scientific discipline divided into several branches, the subject of the proliferation cited at the beginning of this work, branches that sometimes seem or are perceived as distant from the characteristic themes of economics by virtue of the greater or lesser recourse to the contents of other disciplines, typically psychology, statistics and sociology. In reality, it can be said that the birth of the array of studies, that converged in marketing, was a typical economic problem of resource allocation; in fact the roots of marketing can be traced back, on the one hand, to the statistical practices of gathering socio-demographic parameter data, which as regards economics are essentially directed at logistical savings<sup>51</sup>, on the other hand in the practices of product communication (advertising), which in a common sense has always existed but its systematic study can be more realistically attributed to the second half of the XIX century<sup>52</sup>. The baptism of the discipline, however, is usually designated to the academic year 1904-1905, when the term "marketing" appeared in a course held at the University of Pennsylvania (Weld, 1941). Before that date, however, the University of Michigan and Ohio proposed "distribution" and "retail" courses (Maynard, 1941), subjects that would be channeled into marketing as it is now commonly understood. No doubt that in this early period marketing studies were enrolled within the wide empiricism movement and privileged and inductive point of view.

1915 was the year of the constitution of the National Association of Teachers of Advertising (NATA), founded during the annual meeting of the Association of Advertising Clubs of the World; thereafter in 1931 in New York, the American Marketing Society (AMS) was founded. Five years later, in 1936, NATA changed its name to the National Association of Marketing Teachers (NAMT) and together with AMS published the *Journal of Marketing* for the first time. A year later, the two associations merged into the American Marketing Association, which is still an important reference point for the discipline today.

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<sup>51</sup> Lawrence C. Lockley (1950) reports a first electoral survey, published in 1824, where although not actually dealing with market research, he adopted the techniques albeit in a simplified way. According to this author, evidence of real market polls occurred more frequently from 1879 onwards.

<sup>52</sup> Frank G. Coolsen (1947) suggests the Edwin T. Freedley (1852) *Practical Treatise on Business*, as a reference on this topic; already in 1865, there was however, a monthly magazine on advertising, the *Advertising Agency Circular*, later renamed *Advertiser's Gazette*.

From the earliest "ante-litteram" market research to today, the use of statistics has had a leading role in marketing, also evolving from its use as a collection and descriptive analysis tool to a tool for the validation of assumptions and formulations of theories, to the point that today the adoption of advanced statistical techniques is widely present in marketing articles and, in some cases, constitutes a discriminating criterion for the selection of work to be published. However today, as has already been stated at the beginning, marketing has taken on a far more diverse nature not only with reference to issues dealt with within each approach but also in the heterogeneity referring to the way in which these same issues are dealt with. In this section, we will try to highlight the distinctions between the different strands and the epistemological arrangement that is the subject of the first part of this article. The strands that seem most significant are the following:

- positive vs. normative marketing
- micromarketing, macromarketing, exchange marketing;
- strategic marketing and operative marketing;
- marketing management and relationship marketing;
- Fordism and post-Fordist marketing;
- postmodern marketing, school of critical theory, hermeneutic school
- experiential marketing;
- service-driven marketing;

#### 4.2. ***"Positive" marketing vs. "normative" marketing***

As stated, the first orientation in the constitution of the economic discipline in the 18th and in the first part of the 19<sup>th</sup> century, strongly felt the need to emulate the addresses of the natural and nomothetic sciences. Marketing, as a scientific discipline, was structured in a later phase and fell into a specialized thematic area of a neoclassic mould within enterprise theory. In fact, the most relevant epistemological references are those of the managerial disciplines. The *Scientific Management* in the United States and the European versions of this side of research, represented by the Fayol studies in France and by the *Rationalisierung* movement in Germany, had by now gained great visibility and proposed the paradigm of reference in the rational behavior field of studies. Marketing studies consequently tended to assume the form of the rationalist statute with the decidedly normative slant inherent in these approaches. At the end of

the 1950s however, Vance Packard, a journalist working for the publishing house Collier, published a book dedicated to the persuasive practices that in his view should be applied in advertising in large companies, aided by big advertising agencies<sup>53</sup>. The volume had extraordinary success and strengthened the predatory image that large American businesses had acquired from the second half of the XIX century and labeled as *robber barons*. This publication, rightly or not, projected a dark shadow on marketing research and advertising practices and posed the question among academics of whether the discipline should or should not have an exclusively positive orientation and whether the normative approach should retain scientific statute. The issue was resolved in a positive way both in terms of the scientific legality of the normative approach and scientific validity of this approach. The aspect that interests us is that the approach characterized by a positive type of analysis recalled an epistemology that was substantially different from the normative. In the first case, the type of skills required for the description/interpretation of the behavior of subjects postulated the use of the psychological sciences, whilst in the second case the conceptual basis of reference derived from managerial sciences.

In the USA, at the beginning of the 1950s, psychology was deeply influenced by the theories and experimentations of Burrhus Frederic Skinner (1904-1990), professor of Psychology at Harvard from 1958 to 1974, who became the supporter of an approach known as *Radical Behaviorism* that postulated human behavior as the result of the interaction of the biological nature and environmental stimuli and excluded the use of a deductivist approach<sup>54</sup>. It is unnecessary to stress that this approach was very far from the conceptual apparatus of normative marketing analyses that drew scientific reference from deductive schemes centered on assumptions of rational behavior of subjects. The conflict between these two positions drew marketing towards the field of the radical rationalism of marginalist economics. The first consolidation of Marketing as a science was not born in view of empiricism but in view of radical rationalism. Historically, this led to a change in the course of marketing studies in a strictly normative sense and in the 1960s, a paradigm was affirmed that had its references in the rational-deductive approach of the economic-managerial disciplines. The most important exponents of this address were McCarthy (1960), Levitt (1960) and Kotler (1967). Kotler played a particularly

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<sup>53</sup> Packard (1957), *The Hidden Persuaders*.

<sup>54</sup> Skinner (1953), *Science and Human Behavior*.

important role in the diffusion of a typically managerial approach resumed in a four step scheme: *Analysis, Planning, Implementation and Control* (APIC). In the 1970s, this approach was consolidated and became the hegemonic paradigm resulting also from an interesting classification of the epistemological and marketing thematic presented by Shelby D. Hunt<sup>55</sup>. However, to be noted is that this approach had a substantially unbalanced structure arising from the fact that traditionally a normative approach results in the applicative form of a positive analysis of the reality investigated. The fact that a considerable part of positive marketing analyses, relating to consumer analyses, postulated scientific skills decidedly outside of managerial studies, impeded a direct positive-normative dialectic also reflected in normative marketing studies. Classical marketing manuals presupposed the need for the subject agent of a marketing program to analyze the behavior of the consumer, but did not provide the methodological instruments to do so. Amongst others, the APIC paradigm recommended integration of market studies with competitive studies and consumer studies, representing the other branch, but in fact dedicated somewhat limited attention to it compared to its importance.

The effect of this separation and the secondary role of consumer behavior was also maintained when psychological and sociological studies oriented to a deductivist sense<sup>56</sup> were added alongside behavioral type studies, more analogous to the methodological statute of the managerial sciences, but far from the typical skills of the marketing scholar.

#### ***4.3. Micromarketing, macromarketing and exchange marketing***

A first internal contraposition in marketing studies concerns the dichotomy between micro and macro marketing. Micro or macro studies date back to the genesis of the discipline, but acquired conceptual valence only in the 1970s, due to the fact that in those years the debate took shape of whether marketing should only concern profit-oriented activities or if the discipline was also relevant for non-profit activities. This issue was inspired by a series of contributions by Kotler and Levy (1969), Ferber (1970), Zaltman (1971), Kotler (1972), and was to be resolved quite unanimously in favor of an enlargement of marketing studies to also include non-profit

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<sup>55</sup> A first contribution to this issue dates back to Hunt (1976) and was then further enlarged upon by him (1983).

<sup>56</sup> One of the pioneers of this approach was Katona (1953), also with an essay on "Rational Behavior and Economic Behavior".



activities<sup>57</sup>. This comparison of ideas played an important role in that it began to prepare the ground for the subsequent comparison between micro and macro marketing and began to ask the question if behind the difference of problems analyzed (profit and nonprofit) there are (or should be) also different methodological options. This dilemma was not immediately forewarned of, in the sense that it seemed that the previous definition of marketing could also be extended to new issues without the need for a revision of the perspective. The fact that marketing had recently been recognized as an autonomous science which for reasons of convenience here we call "marketing management", clearly plays in favor of a horizontal enlargement of the marketing competences<sup>58</sup>. However, the repositioning of a distinction such as that between micro and macro marketing contributes to a better focus on the issue since micromarketing analyses tend to inevitable be made by assuming the viewpoint of a particular agent of the exchange relation typically represented by the firm and in particular by its function of marketing and commercialization<sup>59</sup>. This view, in terms of being directly aimed at the operational requirements of the large firm experienced a quantitative development not only in terms of studies, but also in qualitative terms through the development of a toolbox able to significantly help the marketing manager in his commercial policy and communication choices. For example: (a) the introduction of the concept of *product life cycle* developed for the first time by Joel Dean (1950) and successively declined in a variety of approaches, some of which however were very questionable<sup>60</sup>; (b) the importance of *market segmentation* stressed by Wendell R. Smith in 1956; (c) the concept of the *marketing mix* initially proposed by Borden (1964). Despite the evident successes of the discipline, the accusation deriving from the criticisms of Vance Packard and others, who indicated marketing as an instrument for the exclusive service of firms and not the consumer and advertising as a tool of persuasion or even manipulation, must be counteracted with a thorough revision from the point of view of the analysis. The answer lies precisely in the methodological proposal of macromarketing. While profit issues remain a central pillar of micromarketing research and are based on a normative approach, the problems of

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<sup>57</sup> Among the few opponents to the enlargement was David Luck (1969).

<sup>58</sup> Among those who consider the problem see Feldman (1971). However, his analysis raises epistemological questions between marketing orientated to business strategy and marketing that must support, for example, maintenance of the environment. The point of view is always that the firm must in substance resolve a problem to which environmental constraints are added.

<sup>59</sup> For the issues of the relationship between micromarketing and macromarketing see Hunt and Burnett (1982)

<sup>60</sup> Stocchetti and Volpato (2007).

macromarketing necessarily entail the analysis of a multiplicity of points of view that consider not only actors who operate on the supply side of goods, traditionally having greater bargaining power than individual consumers, but also the institutional subjects. Macromarketing is supposed to elaborate proposals of markets' regulations directed at concretizing the much-vaunted "sovereignty of the consumer" operated by the liberal economic thought, but difficult to trace in the concrete functioning of the markets, especially after the emergence of big business in the second half of the XIX century<sup>61</sup>. It is clear that for this type of study an approach is needed that is more closely linked to Commons' and Veblen's institutionalist type of economic analysis. The inclusion of macromarketing alongside micromarketing therefore has an important role in that it places at the centre of the debate as much the cognitive objectives of at least part of marketing as well as a methodology that cannot be exclusively empiricist or rationalist. Among other things, this debate has also had the effect of driving outstanding scholars of marketing management to question their research objectives and give more room, in their analysis, to collective interests not based on those of the firm. A development of the debate in this sense seems to be the redefinition of marketing as a science of exchange (*exchange marketing*). By placing the exchange at the centre of the analysis<sup>62</sup>, on the one hand trying to establish the discipline on a phenomenon of maximum universality, in order to derive nomothetic type generalizations, but on the other to postulate a study of distinct interests that are to be mediated in the exchange relation itself. With this view, positive analysis gains weight in the functionality of markets and the search for solutions with similar cognitive objectives to *welfare economics*. An echo of this new sensitivity can also be found, in our opinion, in the *relationship marketing* approach discussed later.

#### **4.4. Strategic marketing vs. operative marketing**

The distinction between "strategic" and "operative" marketing is commonly used to distinguish two phases having different goals and based on different conceptual tools. Strategic marketing concerns the choice of policies aiming at improving the competitive position of the firm, taking account of challenges and opportunities proposed by the competitive environment

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<sup>61</sup> In this respect, suffice to mention the concentration process in the United States following the American Civil War in a number of industries, among the first railways and oil, made famous by the works of Daniel Brown (1977) and Ida Tarbell (1904).

<sup>62</sup> The first development in this sense is probably credited to Alderson and Martin (1965) and was then taken up by Bagozzi (1974, 1975, 2001).

and the firm's internal skills and available resources<sup>63</sup>. Operative marketing is focused on the implementation of specific targets. If accepting this distinction, then the methodological problem of strategic marketing refers on the one hand to the knowledge of the states of reality (knowledge of the competitive environment), and on the other, to knowledge of the competitive models, i.e. the mechanisms governing the creation of durable competitive advantage. The methodological problem of operative marketing instead concerns the knowledge of links between the actions that the firm can put into effect and the changes in the competitive environment. The two issues seem significantly separate on a level of epistemological implications; more precisely, strategic marketing requires both reading and interpreting the economic evolution of a complex environment directly related to a wide array of social, political, organizational phenomena. In the strategic analysis, it is possible to recognize many different schemes of analysis derived from alternative epistemological points of view. Studies based on the PIMS data base – Profit Impact of Marketing Strategy – amongst which that of Buzzel et al. (1975) is illustrative, are a typical expression of empiricism and generally indicated as the first of this strand that was characterized by a strongly empiricist and deterministic approach<sup>64</sup>. There were also positions more oriented to adopting critical rationalism, prevalent in the formulation of competitive positioning models<sup>65</sup>. This evolution of the marketing study orientation was probably due to the long phase of growth in the international economy that started in the '70s. The Ansoff (1965) studies on diversification can be ascribed to this particular situation. But more recently the changes and turmoil generated by globalization has favoured a different approach that is closer to an institutionalist point of view such as that recognizable in the resource-based orientation<sup>66</sup>.

Operative marketing, instead, that takes as a given the interpretation of the environment operated by the strategic phase and defined objectives, restricts the cognitive issue of validation of the hypotheses on the specific relations linking interventions on the environment, or parts of it, and their changes in the functional direction to business goals. The wide use of statistical models connotes operative marketing as a prevalently empiricist discipline, where strategic analysis

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<sup>63</sup> Although with different *nuances* and terminology, the distinction between an analytical/decisional phase (planning or strategic planning) and an operational one is common in manuals e.g.: Lambin (1996, 4 sqq.); Kotler et al (1996, 68 sqq.). See also Kotler (1999) and Tammo et al. (1996).

<sup>64</sup> Bourgeois (1984).

<sup>65</sup> Hofer's (1975) contribution seems emblematic in this sense.

<sup>66</sup> Grant (2005).

often deductively interprets reality, in the light of a series of principles that unite reason to the experience or to the historic reality.

#### 4.5. *Marketing management vs. relationship marketing*

The best known and most widespread expression of the marketing discipline, often also referred to as "marketing management", proposes to organize and coordinate the principles in two dimensions, strategic and operational, with an objective to business goals and with the basic assumption that the ability of a business to meet the needs of its target market is the engine of a virtuous circle, synthetically termed "market orientation" that generates new resources for the renewal of the offer<sup>67</sup>.

The foundations of this view were disputed towards the end of the 1980s by an approach that enhanced the importance of developing long-term relations among players interested in the exchange (Gummesson, 1987), from which the name *relationship marketing*<sup>68</sup> derives. While in marketing management the objective is to maximize the value of the individual exchange or a set of exchanges, considered in isolation through the action on the object of the exchange (product), and on the creation of conditions of exchange that exploit the characteristics of the segment of reference (distribution, price, communication). *Relationship marketing* instead aims to maximize on the one hand, the value of all potential exchanges that each relation could activate in the future, and on the other, the value of the exchange for both contractors, focusing basically on the loyalty of the customer and the creation of personalized exchange conditions<sup>69</sup>. In the pursuit of this approach, the entire organization of an enterprise and the way in which it is coordinated with the customer interface that includes the involvement of the customer in the firm's processes assumes importance, whereas in the traditional approach the customer and the organization behind the distribution function were clearly separate (Gronroos, 1990).

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<sup>67</sup> Many are the authors and the contributions that can be ascribed to this approach that is identifiable in the dominant American school manuals; among all of them we feel we should refer to Kotler and his work as a whole rather to his individual contributions.

<sup>68</sup> Sheth J. N., Parvatiyar A. (1995) show that the concept has roots that date back even to a pre-industrial era, but which was then in a certain sense suffocated by the development of *mass production*.

<sup>69</sup> Gordon (1998) identifies six key points that differentiate relational marketing from traditional marketing, but on close examination these points are a more particular characterization of operative marketing than actual conceptual diversity. Gummesson (1997) speaks of relationship marketing as a "paradigm shift" deriving from focusing on aspects neglected by traditional marketing (mainly the relations, the network, the collaboration).

In the course of time, the contrast between these two types of marketing gradually diminished, both due to the introduction in traditional marketing, of an ever-greater attention to the customer, and for the effective mutual fertilization of the two approaches. Today the differences seem limited to that which just above has been defined as "operative marketing", because the two approaches do not seem to present methodological differences as far as the underlying principles and the analytical part of support are concerned, although there are differences in objectives and principles. Marketing management assumes detailed consumer preferences as its analysis objective where these do not assume a more precise identity than belonging to a certain segment (target market); *relationship marketing* instead contends that these relations should be the analysis objectives and marketing levers<sup>70</sup> at the same time, with the purpose of achieving a total individualization of policies. The focalization on the "relation" does not suggest principles that are antithetical or incompatible with those that guide the relation with the customer in marketing management. The literature inherent in CRM seems to be an attempt to metabolize the relational principles of operative marketing. In a hypothetical situation in which it is economically possible and convenient to devise and serve segments formed by only one client the differences between the two views are few (and certainly not epistemological).

#### **4.6. Fordism and post-Fordist marketing**

An important point in marketing studies is the distinction between Fordism and post-Fordist marketing. As known, Henry Ford's strategy was based on a policy of strict standardization of product which, accompanied by a large scale offer, allowed minimizing production costs and thus aimed for strong market penetration in the first stages of motorization. We know that the automotive market's passage from an first purchase stage to the replacement purchase stage considerably reduced the attractiveness of the Ford proposal in favor of producers who were more oriented to meeting the increasing degree of segmentation of demand. This occurred in the United States in the 1920s, thanks to Alfred P. Sloan's (1993) strategy that was guided by the motto "a car for every purse and purpose" with which the General Motors Group managed to undermine Ford's position as top producer in the world. In Europe, the Fordist phase occurred later than in the US and subsequently the transition to post-Fordism also occurred later. However, towards the end of the 1980s, the traditional Fordist model was superseded everywhere, also as a result of the

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<sup>70</sup> Gummeson (1994) proposes a "checklist" of 30 key points to analyze in this regard.

effect of Japanese competition<sup>71</sup>. The development first defined as post-Fordism then became defined as post-industrialism. In the post-Fordist phase the emphasis in research and marketing of normative proposals focused on consumer preference for variety and innovation in the sense of exalting the differentiation of range and specificity of each producer's brand. The replacement demand for cars in all major markets demonstrated that the competitive game rewarded producers who were in a position to expand the offer with niche products characterized by strong innovation. Marketing research therefore made reference to new concepts<sup>72</sup>, amongst others, *mass customization*, *customer satisfaction*, *time-to-market reduction*, etc. One aspect of this new approach was also the accentuation of the role played by customer loyalty.

It is noteworthy that in this case, the different accentuation of marketing studies did not imply any significant epistemological change of perspective. In general, these studies inscribe themselves in the normative rationality stream typical of marketing management without feeling the need to change their approach following the change of focus of their analyses.

However, post-Fordism was rapidly followed by the transition to post-industrialism, that is to say, to a situation where the economic driving force assumed a new centre of gravity that no longer saw manufacturing as a strategic role of the modern economy. On the one hand, it became more and more convenient to relocate production activities to countries with low labour costs, on the other, a new industrial revolution powered by computer science and telematics was consolidated. The highest added value activities were no longer in the hard component of products but in the soft component. Service activities with high added value emerged which became the new frontier of the economy. Here we face a more radical change from that described by the transition from Fordism to post-Fordism and signs of the utility of a broader methodological reflection became more visible. This exigency has been thrust into the limelight by studies dedicated to *postmodern marketing*.

#### **4.7. *Postmodern marketing, School of Critical Theory, School of Hermeneutics.***

If, as we have seen, the emergence of a postindustrial phase began to emphasize the need for new changes also in the methodological approach of the discipline, then this trend became even more apparent with the subsequent passage from the "modern" to the "postmodern", a

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<sup>71</sup> Freyssenet et al. (1998).

<sup>72</sup> Pine (1993).

change that some authors began to report from the 1930's, but which became a culturally relevant phenomenon in the 1990s.

Trying to give precise content to the postmodern concept in the limited space of an article is virtually impossible, we must therefore refer to the contributions specifically dedicated to this issue<sup>73</sup> also because we face a multifaceted cultural phenomenon concerning a multiplicity of areas: some of a scientific-philosophical nature, amongst which economics and marketing, in addition to philosophy, and others more closely linked to art, literature, architecture, linguistic and visual communications. Here we can only recall that postmodernism is characterized in a cultural sense by the recognition that the myths of progress<sup>74</sup> and humanity's walk towards a more just and balanced future is not only not foregone, as the thought matured in *siècle des lumières* had postulated, but neither is it realistic. Society loses its principal teleological reference and individuals were overrun by a feeling we could call "anomy", even if this term was born with Durkeim long before the concept of postmodernism was coined. This implied, especially on an individual level, a search of the definition of own identity. Consequently, this new mood presumed a different function of the theory.

The responses elaborated by marketing scholars move in three directions: (a) that represented by exchange marketing which in a certain sense is further strengthened by those who tend to be anchored to the classic empiricist vision of the previously mentioned separation of investigating subject and object investigated (b) the critical theory; the detailed and complex theory of postmodern marketing in the proper sense that later on we characterize above all in a hermeneutic sense.

From the critical theory perspective it is assumed that theory cannot only describe that which is existing, but must be used to change the world, i.e. theory that drives a practice of change. A change stimulated also in the methodological bases of analysis of firms and consumers. In the orientation that is acknowledged in critical theory, the conceptual reference is to the Frankfurt School whose scientific advances wind through a multiplicity of elaborations that in a more recent version are summed up in Jürgen Habermas' contributions. The characteristic of this approach is based on the view that a scientific attitude can only be attained through the development of thought that not only describes the reality investigated, but also indicates a

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<sup>73</sup> See Firat and Venkatesh (1993), Firat et al. (1994), Brown (1995), Cova (1996),

<sup>74</sup> Myths that started to shape the Enlightenment

concrete praxis to change the negative aspects of this reality<sup>75</sup>. The point of departure is therefore similar to that of Marxist critique of capitalist society. A society characterized by conflicts of opposing interests, but whose nature today is very different from that of capitalists and the proletariat of XIX century. The much wider conflict that exponents of this position applied to marketing is presented especially in the contrast between consumers on one side and large industrial enterprises on the other. Large enterprises that cannot but apply a logic of profit in the short term apparently aimed at meeting consumer needs, but in fact aggravating the social contradictions of the world: exploitation of strong economies to the detriment of weak economies, foolish use of natural resources, worsening ecological problems, etc. Marketing inspired by the "critical theory" therefore has the onus of analyzing the contradictions in the social organization and developing indications that demonstrate to consumers the ways they can exercise their buying power to promote change, for example in favor of ecologically correct consumption that is equitable and fair. This critical marketing can and must drive a policy of consumer "emancipation"<sup>76</sup>. From a methodological point of view, the rupture between this orientation and classic marketing management could not be more radical. Here the epistemological references are those of the historical totality that must be analyzed with the analyst's assumption of the interests of society as a whole in order to highlight the contradictions between the operation of the system and the emancipation of the individual. The focus of the analysis is aimed at the identification of emerging contradictions between the effective functioning of the social structure (the product of prior choices and interests) and the new needs of emancipation of the various categories of persons and of the weakest in particular (minorities, children, women, etc.). The cultural matrix is Hegelian and Marxian, even if overcoming the contradictions that did not come about through dialectic but by means of initiatives of this researcher who became an active actor of change and of legitimate, but unprotected, interests.

From the hermeneutic<sup>77</sup> perspective, the recall to postmodernism is much more limited, even if this approach does not exhaust the possible valance of postmodernism that may be declinated in a plurality of specific orientations. The hermeneutic perspective seems the most

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<sup>75</sup> The literature on the Frankfurt School is extremely broad, also because it relates to a long period of time. For a presentation of its methodological cornerstone, see Connerton's (1976) summary.

<sup>76</sup> This type of position is expressed in a particularly apparent way in Murray and Ozanne (1991).

<sup>77</sup> Some exponents of critical theory indicate the approach we call *hermeneutic* as *interpretationist*. See Murray and Ozanne (1991).



epistemological and therefore the most relevant. In its more radical conception, social reality is seen as a result constructed on the perception of subjects and on the linguistic intermediation of actors. The cultural and methodological references were those of more recent French philosophy developed on the bases of existentialism and which took a mature conceptual form through the subsequent elaborations of many scholars including Jean-François Lyotard (1926-1998)<sup>78</sup>, Jacques Santer, Jean Baudrillard and Edgar Morin, characterizing the current era termed postmodern, for the loss of sense that stemmed from the ideological premise that society and history were oriented to (and could be interpreted by) a single meaning such as, for example: a) the affirmation of the reason of the Enlightenment, b) the movement summing up the spirit of idealism, c) the technological and scientific progress in terms of efficiency of capitalism, d) the laws of historical materialism of Marxism, etc. Post-modernity is characterized by the fall of these ideologies and consequently the dissolution of stable certainties that provide a precise meaning to life and identity to subjects according to the ideology they recognize themselves in. In this new era, reality is the result of irreducible differences, of a variety of purposes and points of view. This also represented several positive aspects that freed new energies and greater creative potential, but for many actors was a rather stressful reality. Man is disarmed in front of world events that globalization metaphorically brings to the threshold. He no longer has the certainty of being able to give a stable meaning to things, nor knows how to interpret, and therefore in some way master, all the changes to which he is exposed.

Moving directly onto the impact of this vision on a marketing level, it follows that the postmodern era was also a time of image (accentuated by the identifying role of the product with respect to the consumer, the symbolic expression of the status and personality in its many facets), of subjective experience that seeks to recognize and identify itself in group life (tribal marketing, viral marketing, buzz marketing, etc.), of the prominent role played by the product sharing in the formation of affinity consumer circles (various methods of using e-marketing in the creation of *blogs* and second-life type experiences), of the recognition of the importance of making the consumer the protagonist in the marketing relation with the company that offers products (product launches as events associated with shows, consumer forums in new product presentations, etc.), the utility of transforming the point of sale from a supply centre of goods and

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<sup>78</sup> The most important work of Lyotard, towards the development of the postmodern concept, is *La condition post-moderne: Rapport sur le savoir* (1979)

services as a time of experiential social community relations, of media events, of elective affinities between consumers. Further examples could be given but we think the results of the diffusion of postmodern cultural models are by now quite clear. All that remains necessary are two further sentences to emphasize that the hermeneutic outlook institutionalizes relativism. There is not one reality, but many different realities. Above all, an *ad hoc* reality for a certain category of consumer can be created through initiatives of aggregation, exploiting for example the new opportunities offered by new multimedia tools in terms of: one-to-many relationship, speed of contacts and richness of the content of contact. The hermeneutic approach is distinguished not only by the fact that it manifests itself in a highly subjective dialectic, but also by placing focus on the subjectivity of persons participating in the exchange, and even more on the subjectivity of consumers themselves. It wouldn't be useless to underline that this perspective is on one side fascinating and goes towards consumer emancipation, but on the other side offers the possibility of developing into the triumph of Vance Packard's *Hidden Persuaders*.

#### 4.8. Experiential marketing

The concept of experiential marketing was originally introduced by Schmitt (1999), who, drawing on the well-known contribution of Pine and Gilmore (1998), stressed the importance of the "experience" in creating a perception of value in the customer. Basically, for Pine and Gilmore it was about enhancing the offer and image of the enterprise through the creation and sale of experience based on consumer participation and the aggregation of consumers who take part. Pine and Gilmore did not speak of experiential marketing, but of a generic "experience economy", whilst Schmitt's contribution is much more detailed and opposes the experiential approach to four limits that he identified in the traditional marketing approach: a) attention to the experience of the consumer vs. the prevailing attention to the functional features and benefits<sup>79</sup>; (b) attention to the consumption experience in its entirety vs. the definition of the borders of restricted competition to the product categories; (c) the consumer seen as an emotional and rational decision maker rather than purely rational; (d) the use of eclectic methods and tools instead of exclusively analytical, quantitative and verbal methods and instruments. Subsequently, Schmitt detailed an "operational" proposal, but which in fact was entirely free of empirical

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<sup>79</sup> "Experiences occur as a result of encountering, undergoing or living through things. Experiences provide sensory, emotional, cognitive, behavioral, and relational values that replace functional values"; Schmitt (1990, 57).

analyses, that identified and classified the types of experience and their sources, with normative indications on the possible ways of relating with customers, which in fact constituted the operational part of experiential marketing.

It seems to us that this author's approach can be considered as closely matching a postmodern interpretation of the needs of the consumer to an operational program of critical rationalism. A contamination that has become more frequent in this new century where a large number of marketing management authors feel the need to take control of new labels of an innovative flavor and stimulating perspectives (the marketing of marketing theories also exists!).

#### 4.9. Service-Dominant Marketing

We conclude our review of marketing approaches<sup>80</sup> by indicating the emergence of an approach denoted as a service-dominant logic and proposed by Vargo and Lusch (2004). As indicated, this approach could be read as a restatement of a new label for known content<sup>81</sup> and there are also those who recently complained about the need of marketing to take on new approaches and new content<sup>82</sup>. Nevertheless, there is no doubt that this approach has received considerable attention and significant conferences have been dedicated to it, organized amongst others, by the Marketing Association in 2004 and the European Academy of Marketing in 2005. This approach postulates that the service perspective is the core-concept of marketing and that products must be regarded as mere instruments aimed at producing services for the buyer. The creation of value is apparently not so much in the exchange of goods (*value in exchange*) as assumed by exchange marketing, but rather in the value of the use of goods (*value-in-use*). This approach naturally exalts to the maximum the dialogue and co-creation of value of the interaction between the supplier of goods and services and purchasing company<sup>83</sup> (Payne et al. 2008) and between the company selling and the consumer, with an exaltation of the peer-to-peer relationship between supplier and the service recipient, which is inscribed in a now consolidated tendency when looking at B2B relations along the supply-chain, but which still seems very problematic between supplier and consumer. In epistemological terms, this approach seems to represent a

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<sup>80</sup> For lack of space, we leave out the analysis of "ethical marketing" and "fair trade marketing" which are typical of macromarketing. See respectively Murphy et al (2005); Klein et al. (2006) and Moore et al. (2006); Valor C. (2006).

<sup>81</sup> Ballantyne & Varey (2008).

<sup>82</sup> See for example Sheth & Sisodia (2006).

<sup>83</sup> Payne et al. (2008).

generalization of relational marketing but with more robust connections to the demands of institutional marketing sensitive to a balanced examination of the interests of the various categories of actors and characterized by the role of third parties (institutions) with respect to those typical of exchange. The novelty compared to relational marketing is that it is seen as specialist marketing dedicated precisely to the relations in the supply-chain and collateral with respect to *exchange marketing*, while *service-dominant* marketing was born as an extension of totalitarian relational marketing and aims to enhance the values and activities able to centre on the long-lasting relationship between producer and service user.

## 5. Conclusions

Our analysis shows the existence of a wide diversity of methodological perspectives, especially within the first two level of the taxonomy (epistemological roots and economic approaches). Through an assortment of heterogeneous viewpoints, the range of positions varies from empiricist ones, aiming at constituting a nomothetic science (modernist vision) based on general and universal laws, up to hermeneutic positions that deny both the possibility to determine universal laws, and the significance (objectivity) of data and fact derived from the direct experience. Generally speaking, there is no doubt that empiricism suffer from growing number of critiques and it is increasing the influence of those who claim for economics a status of typical social science, whose rules of interpretation have to be defined within a historically-featured framework.

As for marketing scholars positions, an evolving process analogue to that of economic science is confirmed; though, we feel to remark that this partial re-positioning of a part of authors does not go together with a thoughtful consideration on the significance and the methodological meaning and/or implications of this change in perspective.

Basically, the attitude of those who think in terms of “weakening” the nomothetic approach, rather than trying to define properly an historical approach, is prevailing; this happen even between those researchers who seem most responsive towards a re-examination of their own analysis in an anti-nomthetic direction. In effect, in several cases a hybrid position emerges where the analysis try to consider the historical characterization, but without implying also a reflection about the consequences that this change should have on the epistemological ground, that very often remain the empiricist one.

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