

A STUDY ON THE CONCEPT OF SOCIALIZATION BASED ON CLASSIC SOCIOLOGICAL AUTHORS¹

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Abstract

Socialization is treated as a classic theme of discussion for sociological theories, even though the early theorists did not focus their theories on defining this concept; they entered into the debate about the individual and society. This article addresses the discussion of the concept of socialization from the perspective of classical sociological theorists. The objective is to present the theoretical approaches and divergences between Karl Marx, Émile Durkheim, and Max Weber which served as the basis for the development of contemporary sociological definitions of socialization.

Keywords: Socialization; Classicalsociology; Socializationand the classics.

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UM ESTUDO SOBRE O CONCEITO DE SOCIALIZAÇÃO A PARTIR DE AUTORES CLÁSSICOS DA SOCIOLOGIA

Resumo: A socialização é tratada como um tema clássico de discussão para as teorias sociológicas, ainda que os primeiros teóricos não concentrem suas teorias na definição deste conceito, adentravam ao debate sobre o indivíduo e a sociedade. Este artigo aborda a discussão do conceito de socialização a partir dos teóricos clássicos da sociologia. O objetivo é apresentar as aproximações e os distanciamentos teóricos entre Karl Marx, Émile Durkheim e Max Weber, que serviram de base para a elaboração das definições sociológicas contemporâneas sobre a socialização.

Palavras-chave: Socialização; Sociologia clássica; Socialização e os clássicos.

UN ESTUDIO SOBRE EL CONCEPTO DE SOCIALIZACIÓN A PARTIR DE AUTORES CLÁSICOS DE LA SOCIOLOGÍA

Resumen: La socialización se trata como un tema clásico de discusión para las teorías sociológicas, aunque los primeros teóricos no concentraron sus teorías en definir este concepto; entraron en el debate sobre el individuo y la sociedad. Este artículo aborda la discusión del concepto de socialización desde la perspectiva de los teóricos sociológicos clásicos. El objetivo es presentar los enfoques teóricos y las divergencias entre Karl Marx, Émile Durkheim y Max Weber que sirvieron de base para el desarrollo de definiciones sociológicas contemporáneas sobre la socialización.

Palabras clave: Socialización; Sociología clásica; Socialización y los clásicos.

Introduction

This article aims to discuss the notion of socialization for the classics of sociology: Karl Marx, Émile Durkheim and Max Weber. Although, with the exception of Durkheim, these authors have often not addressed this concept in a circumscribed way, it is possible to identify in the vast intellectual production of these theorists the presence of definitions about the process of socialization. This is because the problem surrounding the notion of socialization has always been present at the heart of sociological theories, due to the classic debate involving the individual and society.

The choice to systematize the definitions of the notion of socialization by the classic theories is for the following reason: it is from this initial discussion that contemporary theories have been built. In this way, it complexifies the notion based on the demands of the contemporary world and the countless possibilities for socialization based on the diversification of social institutions, the media and the fact that action has come to be seen on an individual scale.

This article is organized into two sections. The first focuses on the elaboration of socialization as a classic problem of sociology as a science, based on authors who are references in the discussion of contemporary socialization and who sometimes return to this classic problem. They even use the classic theories to contemplate the state of the art or criticize them and point to new possibilities for overcoming these theories. Subsequently, definitions of the notion of socialization will be presented based on consensus in sociological literature and, finally, the theoretical discussion for the classic authors, Marx, Durkheim and Weber.

Socialization as a classical problem in sociology

As previously highlighted, socialization constitutes a fundamental issue for sociological theories, even though some theorists do not address socialization as a concept or notion in a strictly defined manner.

The term 'socialization' is among those basic concepts in sociology (as well as in anthropology and social psychology) that hold as many meanings as there are perspectives on the 'social.' For this reason, theories of socialization are hardly

distinguishable from the major theories of the social sciences (Dubar, [1997] 2005, p. xxv).

The motivations and duration of individuals' actions have become a relevant issue to be explained, leading sociology to seek, "[...] since its great founders, to understand how the most varied experiences solidify into more or less enduring ways of seeing, feeling, and acting" (Lahire, 2015, p. 1397).

Thus, theoretical constructions regarding socialization are part of a "tradition" of sociological thought. In classical theories, socialization was analyzed within the broader project of investigating and explaining social changes and, consequently, human relations. This theoretical development was based on the idea of modern society and on historical and social factors such as the two great revolutions—the Industrial and the French—which are considered historical milestones that "[...] profoundly altered the structures of society, triggering new economic relations, new forms of political organization, and even new cultural conceptions and representations" (Sell, 2010, p. 16).

In other words, theorization on the socialization of individuals in classical sociology is deeply embedded in a broader theorization on social order. It is marked by the transition from traditional societies to modern societies, a shift that entailed "[...] a profound rupture with the past, introducing new ways of organizing production (economy), distributing power (politics), and understanding existence (culture)" (Sell, 2010, p. 17).

Brief definitions on the notion of socialization

As previously highlighted, socialization constitutes a substantial issue for sociological theories, even though some theorists do not address socialization as a concept or notion in a circumscribed manner.

The term 'socialization' is one of those basic concepts in sociology (as well as in anthropology and social psychology) that possess as many universes of meaning as there are perspectives on the 'social.' For this reason, theories of socialization are almost indistinguishable from the major theories of the social sciences: "Theories of socialization practically do not differ from the great theories of the social sciences" (Dubar, [1997] 2005, p. xxv).

François Dubet and Danilo Martucelli, in an article published in the journal *Lua Nova*, titled *Socialization and Schooling* (1997), formulated a definition of socialization that aligns with what was defined by Lahire (2015) in the previous citation, stating that it is:

“[...] the double movement through which a society equips itself with actors capable of ensuring its integration and with individuals, with subjects capable of producing autonomous action. Immediately, socialization is defined by a tension located at the center of various sociological debates, simultaneously mobilizing representations of the actor and representations of the social system” (Dubet; Martucelli, 1997, p. 241).

Beyond the definitions of socialization as a “[...] partial or total, diffuse or explicit framework” or even “a double movement of tensions,” theorists Peter Berger and Thomas Luckmann ([1966] 1985) argue that socialization is a process consisting of three moments: externalization, objectivation, and internalization, which do not occur in relation to a sequential temporal order and are the result of a dialectical process.

In summary, internalization corresponds to the awareness of the practices of others and their apprehension. That is, recognizing others through their actions and, in a certain way, understanding them in one's own manner and through the resources available at the moment. Thus, internalization is a form of incorporation of the social world. The second movement, objectivation, refers to the consolidation of what has been learned through the internalization of society and has been materialized—in behaviors, norms, and social practices, in the arts, language, and institutions—and is reproduced through externalization. Finally, externalization is the subjectivation of the individual concerning the social world through the perceptions created in relation to other individuals. According to the authors, this occurs through the primary means of socialization: language. Language, which is responsible for transmitting meanings, enables interpretative and continuous reflection on individual and collective experiences based on a previously constructed cultural repertoire.

A human being capable of internalizing, objectifying, and externalizing everything that arises from demands other than biological ones becomes socialized and, in this way, transforms into a subject endowed with individuality. Regardless of the authorship of the definitions of socialization, in general terms, sociological literature defines “socialization” as a strictly human action based on human relationships with a natural environment and, above all, with a social, cultural, and historical environment.

According to the definitions proposed by Lahire (2015), Dubet and Martuccelli (1997), and Berger and Luckmann ([1966] 1985), socialization exceeds any mere characteristic of learning norms and delves into the forms and strategies of transmission, incorporation, and re-elaboration of these practices, validating individual experiences and interactions among individuals in the face of such transformations, which, in a certain way, contribute to the construction of identities. This is because socialization can only be conceived through the relationships that a human being weaves throughout their trajectory, as it is in the relationship with others—that is, in collectivity—that the possibility of constituting oneself as a subject emerges. Absent this type of relationship, there would only be a predisposition for life in sociability.

The definitions of the notion of socialization used thus far certainly diverge from the concept of socialization in the “sociology of socialization” (as understood by Marx and Durkheim) while also presenting some convergence with the sociology of individuation (Weber).

Socialization for the classics

Different theorists have sought to analyze and debate individuals in their social relations, and thus, socialization appears as the backdrop for discussions on materialism and idealism, objectivism and subjectivism, the individual and the collective, action and structure, structuralism and ethnomethodology. This classic debate produces explanations that sometimes appear as an opposition—individual versus society—and sometimes as a relationship: the individual and society.

In general terms, the authors refer to what can be considered the two major currents of sociological thought regarding this debate on the individual and the collective: structuralism and subjectivism. In summary, while the theorists representing the first current of this thought attributed a determining weight to the action of social structures over individuals, those linked to the second defended the idea that individuals indiscriminately oriented their actions without society exerting any influence.

This exposition of classical sociological theories will begin with the presentation of Karl Marx's Historical-Dialectical Materialism, for chronological reasons, as an explanation for

modern societies (Sell, 2010). Next, the Functionalist sociological theory of Émile Durkheim and Max Weber's Interpretive Sociology will be presented

Karl Marx

The condition of the individual for Marx must be thought of in accordance with his objective, which was to develop a theory about “[...] the way the capitalist regime functions, based on the social structure, and the development of this regime, based on its way of functioning” (Aron, [1965] 1999, p. 138). In other words, Marx wanted to understand the individual in bourgeois society, this society being “the one that was engendered in the bowels of the feudal order and established in Western Europe in the transition from the 18th to the 19th century” (Netto, 2011, p. 17).

Marx's explanation for the constitution of the individual and their interactions that result in socialization can initially be presented through the category of work, so dear to Historical-Dialectical Materialism. For Marx, it is work that distances man from animality and brings him closer to individualization. This is because no other being is capable of acting with the intention of transforming what is external to them - in other words, nature - into a means or instrument of subsistence, and this is an essentially human activity. The action of transforming what is external is continuous because material production, which aims to meet the first needs, leads to new needs that are only met through new productions. Thus, human needs are transformed on the basis of what has already been produced, which demarcates the characteristic of mutability and historical mediation, because at each stage of social development, there is a different relationship with work. In addition to the transformation of what is material, it is labor that guides the production of consciousness and representations about politics, religion, morality, etc. of individuals (Marx; Engels, [1932] 1998).

In the preface to “Contribution to the Critique of Political Economy”, Marx (2008) states that it is through work, which is the “social production of one's own existence”, that man not only becomes a subject through individualization, but also initiates social relations.

[...] men enter into specific, necessary relations, independent of their will; these relations of production correspond to a given stage of development of their material productive forces. The totality of these relations of production constitutes the economic structure of society, the real foundation upon which a legal and political superstructure arises and to which correspond specific social forms of consciousness (Marx, [1867] 2008, p. 47).

For Marx, individuals do not have the freedom to choose whether or not to establish social relations with others, as such relations are historically determined regardless of their will. This thesis excludes the possibility of the existence of a human nature capable of containing within itself the rationality of an entire society, as well as the impossibility of constructing the “individual being” in complete isolation. For Marx ([1867] 2008, p. 239), man is

[...] an animal that cannot be isolated except within society. Production by isolated individuals, outside of society—a rare occurrence that may happen when a civilized person, who dynamically carries within themselves the forces of society, is accidentally stranded in a wild environment—is as absurd as the development of language in the absence of individuals who live and speak together.

Given these considerations, for Marx, socialization is presented through rationality, historically determined relationships, and the impossibility of isolating the individual from society—since, in such a condition, one would not even be able to develop language. Marx further adds to this discussion the issue of inequality in social relations.

To understand inequality in social relations, it is necessary to delve into the concepts of infrastructure and superstructure—central elements for any analysis of society according to this theorist. The infrastructure holds a central place in the analysis of bourgeois society, as it refers to the economic structures of society and constitutes a unit formed by the productive forces—raw materials, means of production, labor force, and workers. Meanwhile, the superstructure encompasses the political-juridical sphere and the ideological sphere, which includes education, religion, the arts, and the media, among others.

These two structural spheres of society influence each other, but the infrastructure is considered essential for the existence of the superstructure. According to Marx, it is through the productive forces that all other social relations take shape. What regulates these two spheres is labor. Reiterating the inseparability of infrastructure and superstructure, Marx identifies a misalignment within the infrastructure between the means of production and the labor force, as a single individual does not own both spheres. This misalignment results in unequal relations between those who own the means of production and those who possess productive forces, selling them in the form of labor. Consequently, society becomes divided into social classes—the primary historical factor shaping relationships in capitalist society.

A society divided into social classes is consolidated and perpetuated primarily due to the superstructure, as the dominance of the ruling class over the dominated class employs power strategies linked to either force or ideology. In this sense, socialization among individuals is directly related to their integration into social structures and is also determined by the relations of production, in which individuals embody the class to which they belong.

The mode of production of material life conditions the process of social, political, and intellectual life. It is not men's consciousness that determines their being; on the contrary, it is their social being that determines their consciousness (Marx, [1867] 2008, p. 47).

Thus, it is the social structures that determine individual action, thereby prioritizing the collective condition over the individual one. In this sense, social structures prevail in the socialization of individuals, who have limited capacity to alter the established structures. In other words, if the infrastructure dictates the superstructure, the individual is a product of this relationship.

Given Marx's considerations on socialization, the next theorist to be discussed, in a certain way, aligns with the former when analyzing the significance of social structures in shaping individual conditions.

Émile Durkheim

The French theorist aims to analyze the reasons behind individuals' integration into groups or social institutions in modern society. That is, Durkheim seeks to examine the significance of the individual within their collectivity. For the author, the isolated individual is not an object of sociological study; however, when the actions of this individual extend beyond their individuality and are shared with others, they become an object of sociological analysis due to their collective nature. Sell (2010, p. 81) states that

Durkheim maintained the thesis that the explanation of social life is rooted in society rather than in the individual. This assertion does not imply that a society can exist without individuals, which would be entirely illogical. What he sought to emphasize is that, once created by human beings, social structures begin to function independently of social actors, conditioning their actions.

This analytical approach by Durkheim—focusing on society rather than the isolated individual—constitutes his scientific method for analyzing the social sciences. At its core, this method involves defining the object of study, which Durkheim terms a social fact: actions that are not organic and that possess the following characteristics: generality, coercion, and externality (Durkheim, [1895] 2007).

A social fact is general when it is present within the collective rather than as an individual action. It is coercive when it overrides individual wills, representing a position of the whole over its parts. As for externality, it “[...] means that social behavior does not originate from the individual, but from something external to them: society” (Sell, 2010, p. 83).

Based on these principles of social analysis, Durkheim, when examining social changes from the medieval to the modern era, concluded that a crucial factor in this transformation was the division of social labor. This division functions as a regulator between two types of societies with distinct characteristics: mechanical societies and organic societies.

In his work *The Division of Labor in Society*, originally published in 1893, the theorist argues that the division of labor, analyzed as a social fact (i.e., being general, coercive, and external to the individual), is a phenomenon inherent to modern societies—also referred to as organic societies. He asserts that “by simultaneously increasing productive capacity and workers’ skills, it is a necessary condition for the intellectual and material development of societies; it is the source of civilization” (Durkheim, [1893] 1999, p. 15). In the same work, the theorist presents a set of examples to explain the division of labor, demonstrating that this phenomenon can be identified across various spheres of life, from biology and sexual life to economics. In each of these domains, division corresponds to the specialization of functions that may be performed by individuals or social institutions, leading to the highest degree of specialization of knowledge or activities. Durkheim even likens this division of labor—and of the social world—to biological organisms, arguing that “[...] the law of the division of labor applies both to organisms and to societies; one could even say that an organism occupies a higher position in the animal hierarchy the more specialized its functions are” (Durkheim, [1893] 1999, p. 3). In this analogy, each organ differs from others, has a specific function, and yet, the functioning of the entire organism depends on their combined operation—just as in society.

Durkheim, in questioning why individuals integrate with one another to form socialized beings, identifies a sense of solidarity among members of society, whether in traditional societies or in mechanical societies. In organic societies—characterized by organic solidarity—

individuals have already reached a certain level of differentiation. As similarity among individuals decreases, social relationships become highly complex due to the interdependencies created by each individual's function within the social structure (Durkheim, [1893] 1999).

Despite this interdependence, individuals develop autonomy and independence, enabling the division of labor and its derivatives, such as the sexual division of labor and the international division of labor. In this case, society is marked by extreme dependence and a high level of individual consciousness. Even though collective consciousness weakens in this model of society, social morality—so present in mechanical society—does not disappear. Instead, the freedom of each individual makes social coexistence both possible and necessary (Sell, 2010). In other words, it is something general and external to individuals that simultaneously exerts a coercive function to maintain cohesion.

If the defining reference of modern (or organic) societies is the social division of labor, in earlier traditional societies—also referred to as mechanical societies—there is a low division of social labor. As a result, individuals share similar actions, social differentiation of functions is minimal, and individual consciousness is less developed. This, in turn, reduces the differences between individuals and increases both their similarity and collective consciousness. At this stage, cohesion among individuals occurs through shared traditions, such as religious and moral values. People resemble each other and act according to societal traditions, which are considered acceptable by groups and institutions.

Regardless of the type of society Durkheim analyzes, and particularly due to his methodological approach—focusing on what is external to the individual and thus on the social—he grants primacy to society over the individual. Consequently, society plays the role of socializing, integrating, and homogenizing individuals. Education, analyzed as a social fact, is a social phenomenon present in different societies and designed according to the ideal construction of each. It aims to perpetuate social traditions, reproduce habits, practices, and beliefs, regardless of individual will. Through education, society creates the necessary conditions for individual formation and ensures the primary conditions for its own reproduction.

It is evident that the highest level of individual integration into society is not always achieved. This occurs when, in an organic-type society, social cohesion is marked by fissures or fragmentation in its norms and rules, as well as by the weakening of social bonds due to “[...] economic crises, workers' maladjustment to their occupations, and the intensity of individuals' demands on the collective” (Aron, [1965] 1999, p. 297).

In such situations, Durkheim argues that individuals find themselves in a state of anomie—a phenomenon identified only in modern societies. In this condition, socialization from childhood fosters an intense level of functional integration, making its absence detrimental to societal operation. According to Durkheim, an individual experiencing anomie may even resort to suicide. As Aron ([1965] 1999, p. 298) explains, “[...] the study of suicide addresses a pathological aspect of modern societies and most clearly reveals the relationship between the individual and the collective. Durkheim seeks to demonstrate to what extent individuals are determined by collective reality.

Max Weber

Max Weber's theory differs substantially from those of Marx and Durkheim in its understanding of the relationship between individuals and society. Weber is the first classical theorist to shift his focus toward the individual rather than society. Aron ([1965] 1999) states that Weber's theoretical endeavor “[...] leads to a certain philosophy, which at the time was not yet called existentialist but belongs to the type that today is referred to as such.”

First and foremost, Weber sought to break away from the methodological positivism that had been predominant in the social sciences, as exemplified by the theorists previously discussed. His objective was to distance himself from generalizations, which he considered insufficient in explaining social phenomena. He believed that it was not possible for a scholar to analyze the same phenomenon across all societies in a uniform manner.

Thus, it is through an individualizing study of social phenomena, presenting qualitative data that reflect the specificity of the studied object, that generalizations can be drawn by establishing “[...] the principle of causality, which seeks to establish relationships between phenomena, highlighting the causes that generate these very phenomena” (Sell, 2010, p. 110). Based on this premise, Weber proposes analyzing society through the interpretative method (Verstehen), in which social analyses are conducted concerning a specific society while taking historical contexts into account. Additionally, he considers that individual actions originate within culture. Aron ([1965] 1999, p. 452) provides the following explanation of Weber's method of analysis:

[...] in the domain of natural phenomena, we can only grasp observed regularities through mathematical propositions in form and nature. In other words, it is necessary to explain phenomena through propositions confirmed

by experience in order to attain the feeling of understanding them. Comprehension, therefore, is mediated—it passes through intermediaries such as concepts or relations.

In the case of human behavior, comprehension is, in a certain sense, immediate: the professor understands the behavior of those attending their lectures, and the traveler understands why the taxi driver stops at a red light. It is not necessary to observe how many drivers stop at red lights to understand why they act in this way. Human behavior has an intrinsic intelligibility, stemming from the fact that human beings are endowed with consciousness. Very often, certain intelligible relationships become immediately perceptible—between actions and goals, between the actions of one person and those of another. Social behaviors possess an intelligible structure that the human sciences are capable of grasping. This intelligibility does not mean that the sociologist or historian intuitively understands such behaviors. On the contrary, the social scientist reconstructs them gradually, based on texts and documents. For the sociologist, subjective meaning is both immediately perceptible and ambiguous.

With Weber, subjective aspects are introduced into classical sociological analyses, opening space to question the motivations behind individual actions. However, Weber asserted that analyzing the actions of an isolated individual was not the concern of sociology, as such analyses should be conducted within psychology. Sociology, on the other hand, seeks to explain the meaning of individual actions within the collective.

In this sense, “Weber defends the idea that the individual is the foundational element in explaining social reality” (Sell, 2010, p. 107). This is the key point in analyzing the socialization of individuals from Weber’s epistemological perspective: sociological investigation begins with the individual because “[...] one cannot assume the pre-existing existence of social structures endowed with intrinsic meaning” (Cohn, 2003, p. 26). Sell (2010, p. 113) comments that “[...] the possibility of understanding society and its institutions depends on the analysis of individual behavior. Everything that exists in society—its groups, institutions, and behaviors—are expressions and objectifications of human activity, which gives them their meaning and significance.”

Thus, socialization is less centered on society and instead demonstrates that individuals have the ability to alter their socialization in response to social structures. In other words, they are not merely products of socialization; rather, they act based on culture and according to different motivations.

In an attempt to refine the interpretative method, Weber established typologies of social action. However, he acknowledged that this classification of actions could not account for all possible individual actions, as human behavior is infinitely diverse. According to Weber, social

actions can be categorized as instrumental-rational, value-rational, affective, or traditional (Sell, 2010, p. 115).

The first type is driven by rational motivations—where individuals set specific objectives and take action to achieve them. The second type of action is oriented by a belief or value, “[...] whether ethical, aesthetic, religious, or any other interpretation” (Sell, 2010, p. 115), and is independent of the outcome achieved. Affective social action is guided by emotional motivations and “always involves immediate satisfaction and impulse, such as revenge [...]” (Sell, 2010, p. 115). Finally, traditional social action is rooted in customs and deeply ingrained habits.

All types of action are positioned along a continuum of rationality—the closer they align with the first two models, the more rational they are; conversely, the further they deviate, the more irrational they appear. Based on this framework, Weber was able to address his central question regarding the changes brought about by the rationalization of modern society.

For the theorist, modernity is marked by the disenchantment of the world, meaning that there was a rupture with magical and mystical worldviews and a rise in secularization. This implies that “the forms of social and political organization no longer derive their legitimacy from a religious worldview” (Sell, 2010, p. 128). However, this does not mean that social spheres have become entirely autonomous, as Weber does not consider structures to reproduce themselves independently. Instead, he argues that “there are no objective links between spheres of action; only ‘subjective’ links exist—that is, those mediated by acting subjects” (Cohn, 2003, p. 29), once again highlighting the centrality of the individual in the reproduction of structures.

Final considerations

This article aimed to present the concept of socialization according to the classical sociological theorists—Marx, Weber, and Durkheim. Although Marx did not specifically focus on defining and explaining the concept of socialization, within the historical-dialectical materialism framework, socialization occurs through the individual's integration into productive processes—that is, through labor relations, which later come to structure production relations.

For Émile Durkheim, socialization is fundamental to cohesion and solidarity in modern society. Furthermore, he understood socialization as the process by which individuals integrate into society through adherence to social norms and adaptation to historically determined

societal structures. Both Marx and Durkheim, each in their own way, argue for the strong influence of structures and social institutions in shaping individuals.

Conversely, Max Weber, positioned within the perspective of the sociology of individualization—and as a theorist who paved the way for this type of analysis in contemporary sociology—acknowledges a degree of individual autonomy and the influence of culture in socialization. In doing so, he challenges the notion of social structures as the sole determinant in shaping individuals.

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