

УДК 304.3:316.42

METHODOLOGY SPECIFICS OF RESEARCHING SOCIAL SECURITY IN LIGHT OF META-CHANGES IN MODERN SOCIETY

Guzhva Olga – Vice Dean of International Cooperation School of Sociology V. N. Karazin Kharkov National University Ukraine

The article examines the various aspects of social security and methodology specifics of researching social security in contemporary society. Specifically, the article refers that, there are almost no comprehensive scholarly works on the theoretic and methodological and applied issues of social security. The article describes theoretical elaborations on social security. The analysis highlight the necessary of the «new» understanding of social security. The article concludes that the systemic integrative theory may be used as a methodological starting point for studying the issues of social security in modern society. All this actualizes the need not only to review the methodology for studying social security, but also to establish an independent field of social science for studying security.

Keywords: social security, modern society, methodology of researching social security, risk.

У статті розглядається проблема соціальної безпеки та методологічні підходи до її дослідження у сучасному суспільстві. Зазначається, що загальноприйняте розуміння соціальної безпеки досі не сформовано, теоретична і емпірична вивченість даного феномена є вкрай недостатньою. Дослідники розглядають соціальну безпеку як тотожну національній безпеці, яка включає до себе такі складові, як економічна безпека, обороноздатність країни, захист від техногенних та екологічних катастроф, в тому числі і соціальну безпеку. При цьому найчастіше соціальній безпеці як складовій частини національної безпеки відводиться другорядна роль. Метою статті є аналіз соціальної безпеки суспільства як соціологічної категорії, у якості методологічної бази вивчення проблем соціальної безпеки може використовуватись системна інтегративна теорія. Наголошується на необхідності зсуву дослідницьких акцентів від національної до особистісної безпеки, «безпеки людини» (human security).

Ключові слова: соціальна безпека, сучасне суспільство, методологія вивчення соціальної безпеки, ризик.

В статье рассматривается проблема социальной безопасности и методологические подходы к ее исследованию в современном обществе. Отмечается, что общепринятое понимание социальной безопасности до сих пор не сформировано, теоретическая и эмпирическая изученность данного феномена крайне недостаточна. Исследователи рассматривают социальную безопасность как тождественную национальной безопасности, которая включает в себя такие составляющие, как экономическая безопасность, обороноспособность страны, защита от техногенных и экологических катастроф, в том числе и социальную безопасность. При этом чаще всего социальной безопасности как составной части национальной безопасности отводится второстепенная роль. Целью статьи является анализ социальной безопасности общества как социологической категории, в качестве методологической базы изучения проблем социальной безопасности может использоваться системная интегративная теория. Отмечается необходимость смещения исследовательских акцентов от национальной личностной безопасности, к «безопасности человека» (human security).

Ключевые слова: социальная безопасность, современное общество, методология изучения социальной безопасности, риск.

Introduction

The contemporary society sees many radical changes, with the social, economic, and political life constantly transforming. The period at the end of the 20th and the beginning of the 21st centuries saw an increased interest in the issue of security. Various aspects of security are being studied, and new concepts developed. These contemporary approaches have a number of significant features: first, a high priority of human interests when considering security issues; second, a qualitatively new level of developing quantitative assessment methods. The security issue is actualized as part of «reflexive modernization», which has a notable effect on the research methodology used.

According to J. Habermas, modern societies are characterized by intensified social change, which exhausts all resources of everyday practices and the ethics of social life. What becomes increasingly important in this period is a critical attitude toward traditions, egalitarian forms of solidarity, and the role of expert assessments in lifestyle formation. The most important issue accompanying these changes is the provision of social security. Sociologically speaking, the most characteristic feature of contemporary societies is the way rationalization of the living environment interacts with functional differentiation of social system, and how this interaction facilitates (or hampers) the provision of social security.

Flexible organization of labor, the popularity of temporary work teams, changes in rationality models, globalization, individualization, IT penetration – all these processes visibly deform notions of security. It is exactly in this period that the state enforcement becomes the most common mechanism for establishing social security. The problem arises at the stage of decision-making and outlining new strategies supposedly based on the new circumstances and the new understanding of social security. However, what actually underlies these new strategies are outdated methodological principles.

Fluctuation and instability have become common everyday factors, prompting the creation of new relationship types on the micro-level and a decrease in responsibility on macro-levels. This allows one to speak of a risk society.

The transformation of various areas of vital activity leads Ulrich Beck and Christopher Lau to conclude that a transition from the first modernity to the second has taken place [4, p. 525-557].

Ulrich Beck and Christopher Lau use the term «first modernity» to describe a modernity common for states where the society and social relations are organized by territorial principle. A special socioculturally defined lifestyle, full-time employment, and exploitation of local natural resources are all typical of the first modernity.

Today, there are globalization, individualization, glocalization, an actualization of gender issues, part-time employment, and global risks. All these processes are typical of the second modernity. The contemporary society has to simultaneously respond to all the above challenges, which in its turn actualizes the need to study social security issues.

Theoretical elaborations on social security

Theoretical elaborations on social security issues are found in the works by V. la Blanche, H. Mackinder, A. Mahan, K. Haushofer, Z. Brzezinski, H. Morgenthau, W. Perry, F. Fukuyama, and S. Huntington.

An analysis of domestic and foreign scientific literature reveals a large number of publications on the topic of the individual, the society, and the state. An analysis of social security issues based on a systemic-personality approach can be found in works by G. M. Andreeva, V. M. Bekhterev, L. S. Vygotsky, I. S. Kon, A. N. Leontyev, G. V. Osipov, S. L. Rubinstein, Z. T. Toshchenko, V. A. Yadov, and others. The interrelation between social security issues and sustainable development is reviewed by A. D. Ursul, G. P. Shchedrovitsky, and others, while specific types of security—such as economic, informational, regional, and company security, developmental security of a contemporary society in a globalized environment, environmental, legal, social, cultural and educational, religious, and ideological security—are considered by N. A. Blinov, I. N. Bogdanov, A. M. Vasilyev, Y. G. Volkov, K. S. Gadzhiev, G. V. Goncharenko, M. Y. Grachev, V. V. Degoev, I. P. Dobaev, S. S. Zhiltsov, D. N. Zamyatin, Y. Y. Zakharov, B. F. Klyuchnikov, N. A. Komleva, Y. Y. Mitrokhin, V. M. Miroshnichenko, S. A. Modestov, A. M. Ushakov, and others, and the sociology of security by O. V. Buryanov, O. A. Guzhva, A. S. Kapto, V. N. Kovalev, V. N. Kuznetsov, F. K. Mugulova, V. N. Nikolayevsky, V. V. Serebryannikov, G. G. Sillaste, E. N. Fetisov, A. T. Khlopyev, I. G. Shanin, R. G. Yanovsky, and others [10, p. 167-164].

The interaction between the civil society and its features, such as trust, social capital and social security, is analyzed in works by P. Bourdieu, J. Coleman, R. Putnam, R. Rose, and F. Fukuyama.

An important contribution to studying the issue of quantitative as well as qualitative sociological research of social security has been made by S. A. Belanovksy, F. M. Borodkin, A. S. Gottlieb, I. F. Devyatko, A. V. Zhavoronkov, E. F. Kisriyev, A. M. Korobeynikov, V. V. Lokosov, Y. I. Sayenko, V. V. Semenova, N. V. Sergeev, I. N. Taganov, O. I. Shkaratan, V. A. Yadov, and others. In studying social security and the standard of living, one would do well to refer to the findings by Y. V. Balatsky, L. A. Belyaeva, M. Bokov, I. N. Demytyeva, V. N. Minina, M. A. Nugayev, J.-P. Pages, I. G. Yasaveyev, and others. In analyzing social security in the context of tension, social fears, and social interactions, we utilized the principles of social capital and corporate culture change developed by P. Bourdieu, J. Jacobs, G. Kertman, J. Coleman, H. Lowry, R. Putnam, L. Hanifan, F. Fukuyama, and the Russian scholars T. I. Zaslavskaya, P. M. Kozyreva, A. N. Krasilova, N. N. Mogutnova, T. Y. Sidorina, V. V. Radayev, N. Y. Tikhonova, Z. T. Toshchenko, A. D. Khlopin, P. N. Shikhirev, and others.

At the same time, there are almost no comprehensive scholarly works on the theoretic and methodological and applied issues of social security.

The article aims to identify the main methodological features of studying social security at the current stage.

Radical modernizations transforms social institutions in undesirable and unexpected ways, leading to a functional differentiation of its segments, which results in the process of further development becoming uncontrollable. This, in turn, leads to clear differences being established at the individual level between means of activity and lifestyle. In this case, however, the rationalization of relationships does not result in an increase of social security for individuals.

The logic of «first modernity» utilized the «either/or» principle: we vs. them, family vs. the lack thereof, work vs. leisure, facts vs. values, risks vs. security. With the arrival of reflexive modernity, this has been replaced by the principle of «both»: knowledge and ignorance, nature and urbanization, risks and security. The borders between these categories have become vague, action strategies incomprehensible, and what used to be clear and obvious has become doubtful and undefined. The phenomenon of social security itself has become «incomprehensible».

The above trends make clear the need to review the methodological positions in studying social security.

The «new» understanding of security

The «new» understanding of security must take into account the arrival of many new demarcations. Previously, the clear delineation of various forms of rationality, areas of activity, and categories enabled people to model their behaviors in specific situations. Consequently, it was clear which behaviors should be considered safe and which should not. The disappearance of such «borders» also actualizes the problem of social responsibility. When the lines are vague or nonexistent, it is hard to figure out who is responsible for what, and who should provide security.

Furthermore, the phenomenon of security itself becomes «vague» and «incomprehensible». Whereas previously anything beyond the normative model of security was ignored and unacknowledged, today many alternative lifestyles, alternative social practices and types of social activity have become socially approved, resulting in a large number of institutional problems.

These tendencies emphasize the need for methodological reflection, for seeking new criteria of social security change in order to solve practical problems.

«Modernity» is manifested in that individual social actors (individuals, social groups, and social institutions) have an infinitely wider choice in pursuing their private goals and interests, being to a significant extent free of traditions.

In this context, rationality ceases to be a determining factor in choosing an action strategy or a lifestyle. Consequently, security is also no more viewed as a rational factor. Rationality has lost its universality and abstractness, and turned out to be dependent upon the sociocultural context. The attempts by J. Coleman to explain the theory of rational choice, norms, and social security as a component of the society's organizational structure has revealed rather the shortcomings of this theory than its applicable aspects, as was the author's intention. The author believes the rational person takes no part in social communication, in constructing the social sense and alternative behavioral strategies, but follows established customs and behavioral norms and strategies.

Here, «norm» refers to the complex of sanctions regulating social behavior. In this context, security is also a norm. But J. Coleman's interpretation fails to explain the situation where a rule cannot be justified solely by the fact that it is customarily observed. Each time an individual encounters a rule, he or she evaluates and interprets it. The individual's urge for cooperation competes with their urge for freedom, and in this case the choice is frequently not rational. The pattern becomes even more complex when viewed at the macrosocial level of the individual's interaction with macrosocial phenomena. In this interpretation, social security becomes a quality that is extremely difficult to operationalize [1, p. 93-103].

The Thomas theorem is potentially an interesting tool for explaining the choice of strategies for safe or unsafe behavior. We may state the fact that what underlies all deviations from the theory of rational action is the following: any action decision includes a specific «definition» of the situation by the actor, which first acts to structure preferences and expectations, and only *then* does a choice of a behavioral model occur based thereupon. This is why actors' actions are perceived as totally specific, and not necessarily objective-rational, with their subjective aspect often overshadowing any rational consequences of such interactions. Actors' subjective notions serve as quite significant factors in determining the choice of action, regardless whether these are correct from the rational standpoint. This fact is exactly what poses the biggest problem: the same objective situation may be very differently perceived and «determined» by different actors. Thus, the specific «determination» of the situation by the actor becomes crucial in choosing a «mode of action». Ignoring the discrepancies between the subjective and objective viewpoints may lead to serious errors in interpreting safe interaction in any area of social life.

The Thomas theorem states that what matters at the moment of action are only the subjectively real, albeit frequently wrong and «irrational,» perceptions of actors, and that an action has «real» and objective consequences, even if the subjective viewpoint contradicts objective reality*.

The subjective view of the situation and the urge to obtain capital is determined by social institutions to a much larger degree than it may seem at first glance. For example, the possession of some cultural capital that results in feelings of social wellbeing and acceptance may lose its value or even become an antivalue when the situation is considered institutionally. So one should after all be guided by specific «social definitions» in making a choice. One may even speak of a certain «correct» subjective determination of the situation. Only when very little is at stake does the discrepancy between the subjective and the social determination of a situation become irrelevant.

It should also be noted that the actor's «emotional attitude» based on a specific understanding of the security and risk situation will be very different when the situation is limited, thus forcing the actor to choose promptly, and when he or she is able to «interpret» and reflect upon the situation [9, pp.177-183]

Discussion

Risk becomes a sociogenic factor of human existence. The risk society «does not contradict the modern but is an expression of its consistent development beyond the industrial society» [2, 3]. As noted by I A. Malkovskaya, risk has revealed its new social guise as the price of comfort, consumption, and technological progress [see 11, p. 159].

Kuznetsov identifies the following types of risk: household risk; environmental risk; economic risk; civic responsibility risk; business risk; commercial risk; noncommercial (political) risk; entrepreneurial risk; acceptable risk; and the risk of accidental property loss [11, pp. 60–62]. However, there have been almost no comprehensive studies of existing risks in the post-Soviet territories.

There is quite a large number of international risk studies whose methodology may be considered when researching social security issues (e.g., European Social Survey (the ESS), Political Risk Services (PRS), International Country Risk Guide (ICRG), World Economic Forum (WEF), The World Competition Yearbook (WCY), The Institute for Management Development, Lausanne (IMD), The Political and Economic Risk Consultancy, Hong Kong (PERC), The World Bank's World Business Environment Survey (WBES), The World Markets Research Centre (WMRC), The Business Environment and Enterprise Performance Survey (BEEPS) Global Competitiveness Report (GCR) of the World Economic Forum (WEF), and others).

P. Sztompka notes that the sociological theory has developed mechanisms for analyzing the incidence of social and cultural trauma caused by social change or realized threats. These are anomie; civilization incompetence; social friction; distrust syndrome; collective guilt; collective shame; identity crisis; legitimacy crisis; and the cultural lag theory.

Of the threats that foster the arrival and escalation of traumatic situations, P. Sztompka has identified the following: revolution, street riots, coups d'état; stock exchange crashes, bank crises; radical economic reforms; colonial invasion, foreign occupation; forced deportation or immigration; mass killing, genocide; religious prophecies, religious reformation; resignation of a high-ranking official, assassination of a president; government scandal, political conflicts; corruption; the truth about the past, opening of secret archives; revision of a nation's heroic tradition; lost wars, collapse of an empire; and terrorism [13, p. 11].

On the one hand, we must establish the potential of sociological approach to analyzing social security; on the other, note the many conceptual and methodological issues that require interpretation. At present, there are almost no comprehensive works on the methodology of studying social security. We may conclude that there is a discrepancy between the theoretical and the empirical knowledge on security.

The approach to studying social security through analyzing the dynamics of studying challenges, risks, and threats to the individual or the state (H. Morgenthau's approach) has turned out to be a «methodological trap».

The number of threats and risks is largely vague and differentiated, and the subjective factor plays a significant role in assessing perceptions of a situation. The same applies to interests.

We need a methodology that would transcend the research field of the interests category.

Such an approach implies studying goals, values, social responsibility, public competence regarding security issues, social fears, social tension, the culture of security, the motives for unsafe strategies, etc., by sociological means.

Based on the proposed focus of analysis, social security may be measured by the following indicators: types of social fears; level of social tension and anxiety; level of trust; lenience and tolerance; degree of social responsibility; ability to compromise; solidarity; and the subjective evaluation of justified risk.

*Similar ideas are expressed in Max Weber's concepts of subjective sense, the early formulation of the subjective-expected utility theory, the SEU theory, and the theory of rational choice.

According to N. Luhmann, the state of security is determined through compromise as the value between justified risk, which is formed subjectively, and acceptable risk, which is determined institutionally.

One may speak of two levels of compromise:

1. The compromise between danger and social guarantees by the state.
2. The subjective interpretation of the degree and nature of dangers acceptable to each individual.

However, in practice such subjective and often irrational interpretation engenders a «compromise-free space,» with a high probability of unpleasant unjustified risks and, consequently, a low level of security. As of now, this aspect remains virtually unstudied.

In 1996 V. N. Shubkin and V. A. Yadov, in a study of dangers, proposed a classification system comprising 43 types of danger. Based on this, two strategies for studying security were proposed [12, pp. 62-76; 14, pp. 85-89].

1. Studying the institutionalization of danger and the culture of danger in order to develop ways of creating a culture of security.
2. Studying the spread of danger through fear, P. Sztompka's «sociocultural trauma», conflict, crisis, mistrust, and optimism.

Methodological foundations for studying danger are also elaborated upon in the works of M. Douglas (Douglas M., 2000).

Studying the logic, motives, and dynamics of fears enables one to identify mechanisms for and specifics of formation of the «danger type of consciousness» (both individual and group). In this context, some authors talk of «the symbolic nature of security» [8], or even a risk culture [5, p. 14].

Conclusions

The contemporary situation has made clear the society's need for sociological studies of the phenomena of danger, security, and the culture of security. A lot of aspects remain unstudied.

The systemic integrative theory may be used as a methodological starting point for studying the issues of social security in modern society.

To do this, we must:

- conceptualize the «social security» category by integrating the categories of «personal security», «state security», «national security», «economic security», «information security», and so on;
- identify the interactions among the above categories and determine the subject field for studying social security;
- cover the entire range of threats typical of modern society and possible responses to these;
- conduct a so-called «country-level analysis».

The problem of security is systemic, comprehensive, and multifactor in nature, and thus can only be studied in the broader context of analyzing social challenges at the state and personal levels.

All this actualizes the need not only to review the methodology for studying social security, but also to establish an independent field of social science for studying security.

REFERENCES: 1. Barman E. What a weberian approach to interests can contribute to economic sociology/ Guseva A. // *Theory and society*. – Dordrecht, 2005. –N 34. – P. 93-103 2. Бек У. Общество риска. На пути к другому модерну /У. Бек., пер. с нем. В. Седельника и Н. Федоровой; послесл. А.Филиппова. – М.: Прогресс-традиция, 2000. – 384с. 3. Beck U. The Silence of Words and Political Dynamics in a Global Risk Society / U Beck. – Moscow, 2001 4. Beck U. Second modernity as a research agenda: theoretical and empirical exploration in the «meta-change» of modern society / U. Beck, Cr. Lau // *British journal of sociology*. – L., 2005. – Vol.56 – №4.-p.525-557. 5. Bernstein P. Against the Gods: A Remarkable Culture of Risk, translated from English / Bernstein P. – Moscow, 2000. – p. 14. 6. Douglas M. Purity and Danger: An Analysis of Concepts of Pollution and Taboo / Douglas M., translated from English. – Moscow, 2000. 7. Favereau O. The missing piece in rational choice theory // *Rev.fr.de sociologie* – 2005. –№46. 8. Гидденс Э. Глобализация социальной жизни / Гидденс Энтони // *Социология*. – М.: Эдиториал УРСС, 1999. 9. Гужва О.А. Социологическая перспектива изучения социологии безопасности (теоретико-методологические основы и проблемы развития) / Гужва О. А. Николаевский В. Н. // *Соціологія в ситуації соціальних невизначеностей. Тези доповідей, учасників I конгресу Соціологічної асоціації України*. – Х.: ХНУ ім. В. Н. Каразіна, 2009. – с.467. 10. Гужва О. А. Возможности теоремы Томаса в объяснении модели поведения субъектов конфликтного взаимодействия / Гужва О.А. // *Методологія теорія та практика соціологічного аналізу сучасного суспільства: збірник наукових праць*. – Випуск 15. – Х.: ХНУ ім. В. Н. Каразіна, 2009. – с.177-183. 11. Кузнецов В. Н. Социология безопасности / Кузнецов В. Н. // *Учебник*. – М., 2006. – с. 60–62. 12. Shubkin V. N. Fears in Russia / Shubkin V. N. // *The Sociology Journal*, issue 3, 1997. – pp. 62–76. 13. Sztompka P. Social change as trauma / P. Sztompka // *Sociological Studies*, issue 1, 2001. – p. 11. 14. Yadov V. A. The structure and incentives of a socially anxious consciousness/ Yadov V. A.// *The Sociology Journal*, issue 3, 1997. – pp. 85–89.