


Robert K. Merton

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*Sociology of Science  
and Sociology as Science*

Edited by Craig Calhoun

Columbia University Press  New York

## How Merton Sociologizes the History of Ideas

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The work of Robert Merton presents a paradox. At all stages of his career, Merton's writings display breathtaking intellectual-historical erudition, an understanding of ideas and thinkers from the past that seems to know no limit and which stands unrivalled among sociologists of the twentieth century. In a footnote of an article published when he was barely twenty-six, Merton mentions casually that "Machiavelli, Vico, Adam Smith (and some later classical economists), Marx, Engels, Wundt, Pareto, Max Weber, Graham Wallas, Cooley, Sorokin, Gini, Chapin, [and] von Schelt-ing" are among "some of the *modern* theorists" who concerned themselves with the "unanticipated consequences of purposive action" (1936:894 [emphasis added]). In a midlife essay on "problem-finding in sociology," he comments that "in science as in everyday life, explanations are sometimes provided for things that never were" and then lightly tosses off the following elaboration:

We need hardly review the long list of notorious episodes of this kind in the history of thought. Consider only Seneca explaining why some waters are so dense that no object, however heavy, will sink in them or why lightning

freezes wine; Descartes explaining why the pineal gland could exist only in man just a short time before Niels Stensen discovered it in other animals; Hegel solemnly explaining why there could be only seven planets and none between Mars and Jupiter just as Piazzi was discovering Ceres in that very region; the talented physiologist Johannes Muller explaining why the rate of transmission of the nerve impulse could never be measured just a few years before Helmholtz proceeded to measure it; J. S. Mill explaining the impossibility of sound statistical studies of human behavior long after Quetelet and others had conducted such studies. (1959:xiii)

Twenty years later, looking for a simple and convenient illustration of the “logic [of experimental control] built into multivariate analysis,” Merton thinks nothing of interjecting that: “One periodically needs to recall from one’s student days the pertinence of the story told by Diogenes Laertius about Diogenes the Cynic who, when shown the votive tablets suspected by sailors who had escaped shipwreck ‘because they had made their vows,’ inquired ‘Where are the portraits of those who perished in spite of the vow?’” (1977:34).

Hundreds of such examples appear throughout the Mertonian oeuvre, which at times seems barely able to contain the swell of Merton’s immense knowledge of the history of ideas. For sociologists, however, all of this has long been overshadowed by the opening pages of his most widely read work, *Social Theory and Social Structure*, where Merton argues in favor of the “systematics of sociological theory” as against the “history of sociological theory.” For decades, this argument has furnished seemingly incontrovertible evidence that, *as a sociologist*, Merton abjured the history of ideas except insofar as past ideas were directly relevant for contemporary sociological analysis. This view, at any rate, has long stood as the received wisdom about Robert Merton and the history of ideas. The first section of this chapter reviews this interpretation. The second section examines a very different aspect of Merton’s thought by drawing on a neglected set of writings dating mainly from late in his career. The claim of this section is that, in these writings, Merton fuses the intellectual-historical and sociological dimensions of his thinking to produce an original and fertile historical sociology of the genesis and diffusion of ideas (and the linguistic forms that enfold them). The third section briefly speculates on the relationship between the two sides of Merton’s work.

1

The received wisdom about Merton and the history of ideas rests on high textual authority. Barely a page into the 1949 and 1957 editions of *Social Theory and Social Structure*, Merton speaks forcefully of the need to differentiate of the “history of theory” from the “systematics of theory.” Applying this distinction to the field of sociology, Merton equates “systematics” with “currently operating” or “utilizable sociological theory,” which “represents the highly selective accumulation of those small parts of earlier theory which have thus far survived the tests of empirical research,” whereas “the history of theory includes also the far greater mass of conceptions which fell to bits when confronted with empirical test, [among these] the false starts, the archaic doctrines and the fruitless errors of the past.” Conceptions of the latter kind, in Merton’s view, “may be a useful adjunct to the sociologist’s training”—“exercises in the conduct of intellectual inquiry”—but “little of what [many of the intellectual] forerunners [of sociology] wrote remains of pertinence to sociology today.” Hence, to confound “history” and “systematics” is to perpetrate a “fatal confusion,” which Merton states that he will avoid (in the book that follows) by dealing “*not* with the history of sociological theory but with the systematics of certain theories with which sociologists now provisionally work” (1949:4–5, 1957:4–5 [emphases modified]; cf. 1948:165).

Expressed in such sharp prose, these are not noticeably ambiguous sentences. Even so, in the third edition of the book, Merton returns to the subject, clarifying that his insistence on the distinction between history and systematics aims not to condemn, but rather to encourage “the writing of authentic histories” of sociology by “the authentic historian of ideas”—in this case, the “historian of sociology” (1968:2, 17, 35). While strongly affirming this point, however, Merton continues to insist that for “the *sociologist qua sociologist*, rather than as historian of sociology,” “the study of classical writings can be either deplorably useless or wonderfully useful”: the first when “anemic practices of mere commentary” and “sterile exegesis” dominate; the second when “the present uses of past theory” guide the engagement with classical predecessors, and sociologists confine their intellectual-historical forays mainly to “following up and developing the [currently promising] theoretical leads of significant predecessors” (1968:35, 30 [emphasis modified]).

That this is Merton's position and that this is the viewpoint that informs many of his substantive writings are not issues at all in dispute among those who have engaged his work. To the contrary, restatements of this motif from *Social Theory and Social Structure* serve to anchor the major exegetical writings on Merton, as well as the edited volumes devoted to the analysis of his thought, all of which agree that "Merton is quite faithful to [his] professed policy" of orienting instrumentally to the intellectual past, drawing upon it only to the degree that doing so furthers contemporary theory and empirical research (Sztompka 2000:15–16; see also Sztompka 1986, 1996; Crothers 1987, 2003; Clark, Modgil, and Modgil 1990; Coser 1975a; Mongardini and Tabboni 1998).

So established, this interpretation has generated what appears to be an obvious corollary: the claim that, as a sociologist, Merton advocated an ahistorical approach to the history of ideas, an approach largely unconcerned with the historical context, with the specific places and periods, in which past ideas originated and subsequently developed. This is the contention, for example, of Lewis Coser—of all of Merton's distinguished students, the scholar who was probably the most knowledgeable about intellectual history. In Coser's view, the analytical procedure that Merton regularly follows when treating social thinkers from the past "is to surgically remove those layers and tissues of a thinker's thought that show the mark of his time, his place, his milieu, so as to be able better to expose that vital core of his message which transcends the various existential limitations that might have entered into his perspective. . . . By stripping [the] time-and-place-bound elements from the intellectual productions of the past, it becomes possible for Merton to incorporate past contributions into the body of current paradigms which can become springboards for future advance" (1975b:87).<sup>1</sup>

As his wording indicates, Coser seeks to characterize Merton's practice as ahistoricizing not to criticize but rather to celebrate Merton for his "creative appropriation" of the past, his ability to extract "theoretical gold [from] the most unlikely . . . quarries" (1975b:96; Coser and Nisbet 1975:7). In contrast, other scholars view this same "stripping" practice as fundamentally objectionable, a major obstacle to the sociological study of intellectual history. In this vein, for instance, Robert Alun Jones reproaches Merton for severely limiting sociologists (as distinct from historians) in regard to "the questions [they] might put to the past and . . . the answers [they] might expect in return" (1983a:132). Moreover, according to Jones,

the issues which "the hypothetical adherent of Merton's methodological injunctions [(to distinguish history from systematics) will fail to] yield anything which we might recognize as an account of past social actions" that has historical validity (1983a:132–33; see also Jones 1977, 1983b).

At stake here in regard to Merton is one of the fundamental questions to consider in reckoning with the work of any major figure in the sociological tradition: to what extent does he or she offer an approach that accommodates history and the variety of time and place? Insofar as the history at issue is the history of ideas, both Coser, speaking in favor of Merton, and Jones, writing in opposition, urge the same verdict: namely, that Merton's approach is ahistorical, disregarding the time-and-place-bound elements of the intellectual productions of the past so as to appropriate what holds relevance for those questions, and only those questions, that form part of the present-day systematics of sociological theory. And, perhaps not surprisingly in the face of this agreement among the different scholarly parties, this judgment of Merton has held firm for several decades, provoking no dissent of any kind. For all this, however, overlooked evidence suggests a need to reopen the case.

## II

The interpretation of Merton that Section I describes was well established by the mid-1970s. Yet, at just this time, Merton was actively engaged in another line of work which would provide one of his main focus points during the last twenty years of his life. Looking backward from the full corpus of writing that Merton eventually produced in this vein, one can, to be sure, find harbingers of these later developments at earlier stages in his career. In his graduate student days, Merton found dictionaries and volumes devoted to quotations and new words "irresistible" (Merton 2004b:239; see also Merton and Barber [1958] 2004:141). As a junior scholar, he observed the great "variety of terms" that different cultures use to capture the phenomenon of unintended consequences and expressed "hopes to devote a monograph. . . . to the history and analysis of this problem" (1936:894n3). At midcareer, he marked "ideas [and] categories of thought" as central topics for the sociology of knowledge ([1945] 1973:12) and turned attention, in a monograph on a World War II bond drive, not only to the rhetoric of persuasion—quoting Hobbes on the power of "Words [that] are

most grateful to the Ear”—but also to the significance of popular “slogans” ([1946] 2004:20, 33–35; for discussion of Merton’s concern with rhetoric, see Simonson 2004, 2010). Simultaneously, he launched the sociology of science and, in doing so, included among its topics the “words” and “concepts” that natural scientists use (Merton and Barber [1958] 2004:67).

From the mid-1950s onward, however, these various undercurrents began to push to the fore and intersect into what gradually emerged as a major research project in its own right. The signal turn in this direction was Merton’s 1958 study (with Elinor Barber) of the word “serendipity,” though more than four decades lapsed before this study appeared in print (supplemented by extensive additional research on the subject that Merton carried out in his final years) (Merton 2004b). In the interim, Merton published, sometimes in the deceptively quiet guise of autobiographical fragments, a wide range of related studies, among them: *On the Shoulders of Giants* ([1965/1985] 1993), “The Origin of the Term Pseudo-Gemeinschaft” (1975), *The Sociology of Science: An Episodic Memoir* (1977), “The Kelvin Dictum” (with Stigler and Sills, 1984), “De-Gendering ‘Man of Science’” (1989 [German], 1997 [English]), “Opportunity Structure” (1995a), and “The Thomas Theorem” (1995b) (see also Merton 1980, [1982] 1984, [1985] 1993, 1998, and Merton and Wolfe 1995). With David Sills, he also produced the massive volume *Social Science Quotations* (1990) and examined the use of quotations as a sociointellectual phenomenon (Sills and Merton 1992a, 1992b).

While this body of work exceeds many times over the opening chapter of *Social Theory and Social Structure*, it remains virtually unknown among sociologists both in terms of its individual items and as a totality. Regarding the totality, Sztompka offers a brief paragraph on Merton’s late concern with “the fate of scientific concepts and phrases” (2000:21) and Crothers (2003a) a slightly more extended report (see also Crothers 1987:30–31), but here the scholarly literature stops.<sup>2</sup> And the individual items have hardly fared better, with the equivocal exception of the study of serendipity, which appeared shortly after Merton’s death and was widely reviewed in this context. What is more, when sociologists have remarked on some of the separate pieces, the tendency has been to view these as entertainment rather than as contributions to a serious intellectual project, as in Coser’s characterization of *On the Shoulders of Giants* as a “delightful and whimsical book” (1975b:86), Crothers’s description of the same book as an exercise “couched in a delightful Shandean mode” (1987:39), and

Sztompka’s gloss of Merton’s article on the Kelvin dictum as an “intellectual game” (1986:101). To date, only humanists (and scientist-humanists) have probed a few of these writings more deeply, albeit not with the purpose of elucidating their sociological contribution (see Donoghue 1985, 1997; Eco 1990; Gould 1990; Holton 1997; Schulman 2003).

That Merton himself viewed these writings in light of a larger intellectual project, rather than as occasional amusements, is something that he made increasingly explicit, however. The earliest direct indication of this larger project appears when, in the original subtitle to their monograph on serendipity, Merton and Barber glossed their work as “a study in historical semantics” (see Merton 2004a). Thirty years later, Merton retitled this project, greatly enlarged in the interim, when he laid out the writings that he then had in progress in the form of a “menu”: a listing of forty-six topics from his working files that he offered to the editors of the *Annual Review of Sociology* as possible subjects for an invited autobiographical essay. Fourteen of these topics he grouped together for the occasion under the broader rubric of “Neologisms as Sociological Concepts: History and Analysis,” presenting these topics as follows (1987:25–26):

1. On The Origin and Character of the Word *Scientist*
2. Self-Exemplifying Ideas: in the Sociology of Science and Elsewhere
3. Influentials: Evolution of a Concept
4. Institutionalized Evasions and Other Patterned Evasions
5. SED: Socially Expected Durations as a Temporal Dimensions of Social Structure
6. Homophily and Heterophily: Types of Friendship Patterns
7. “Whatever Is, Is Possible”: A Brief Biography of the Theorem
8. Opportunity Structures: A Brief Biography of the Concept
9. “Haunting Presence of the Functionally Irrelevant Status”: The Structural Analysis of Status-Sets
10. “Phatic Communion”: Malinowski’s Need of a Cognitive Conduit
11. Comte’s “Cerebral Hygiene” and the Presumed Dangers of Erudition for Originality
12. *Veritas Filia Temporis*: Temporal Contexts of Scientific Knowledge
13. *Pseudo-Gemeinschaft* and Public Distrust
14. The Travels and Adventures of Serendipity: A Study in Historical Semantics and the Sociology of Science (with Elinor Barber)

Six related items appear elsewhere on the same menu: “The (William) James Distinction: Acquaintance With and Knowledge About”; “The (Kenneth) Burke Theorem: Seeing as a Way of Not Seeing”; “The (L. J.) Henderson Maxim: It’s a Good Thing to Know What You Are Doing”; “OBI: Obliteration (of Source of Ideas, Methods, or Findings) by Incorporation (in Canonical Knowledge)”; “‘Trained Incapacity’: A Case of OBI”; and “The Adumbrationist Credo: What’s New is Not True; What’s True is not New” (1987:24–25). Five of these twenty titles—the items numbered 1, 5, 8, 13, and 14—correspond to studies that Merton eventually published, while the fifteen others remain (presumably) still among his unpublished papers. But, remarkably, twenty of Merton’s forty-six working sociological files at this career stage appear to focus on the history of particular “words,” “concepts,” “neologisms,” “theorems,” “distinctions,” “maxims,” and other linguistic expressions.

In 1995, looking back to this menu, Merton characterized the enumerated studies, significantly, as “part of a research program centered on ‘Sociological Words, Concepts and Paradigms’” (1995a:4n1 [emphasis added]), and two years later he referred to several of them collectively again—this time along with *On the Shoulders of Giants* and his articles on the Kelvin dictum and the Thomas theorem—as among his continuing “excursions into the sociological history of culturally strategic words” (1997:225, 245n4; cf. 1995b, 381–382). Finally, in the preface that he wrote to accompany the long-delayed publication of his study of serendipity, he states that he and Barber altered their 1958 subtitle to “a study in sociological semantics” because they now understood their work as “an early exercise in what can be better described as a barely emerging ‘sociological semantics’” (2004a:x [Merton’s emphasis]).

Why Merton’s nomenclature shifted over time is an intriguing biographical question that is outside the scope of this chapter. Of concern, instead, are the basic tenets of the research program to which he variously alluded and the implications of this program for understanding his work more generally. In this regard, the thesis of this section is that the studies that comprise Merton’s sociological semantics constitute a rich and novel contribution to the sociological analysis of the history of ideas and, furthermore, that this contribution necessitates the revision of the accepted view that, as a sociologist, Merton accommodated the history of ideas only insofar as the intellectual products of the past were of relevance for advancing the present-day systematics of sociological theory.

That the received image of Merton as an ahistorical thinker requires some correction may already be suggested by the sheer number of separate lines of investigation that he included among his “excursions into the sociological history of culturally strategic words”—somewhere between a dozen and two dozen historical studies (depending on how one counts the unpublished items to which he refers). Notable as well, considering that Merton rarely undertook writing projects of monograph length, is that three of the five monographs that he did author during his career—*Serendipity*, *On the Shoulders of Giants*, and *The Sociology of Science: An Episodic Memoir*—fall among these intellectual-historical works (as, in different ways, do his other two monographs, his dissertation-book, *Science, Technology and Society in Seventeenth Century England* [1938] 1970, and *Mass Persuasion* [1946] 2004). What is more, in the course of these monographic studies and several of his shorter semantic inquiries, Merton immersed himself in original historical research, using extensive collections of documents (unpublished in some cases), during which whatever concerns he may have had with the systematics of contemporary sociological theory remained subterranean at best. Still further, as Merton presents them, these works had as their task the investigation of consequential subjects in modern intellectual history, including (re *On the Shoulders of Giants*) “the enduring tension between tradition and originality in the transmission of the growth of knowledge” ([1994] 1996:358); the “role of measurement in scholarship” (re “The Kelvin Dictum”) (Merton, Sills, and Stigler 1984:319); and “the historically changing access of women to the world of scientific inquiry” (re “Man of Science”) (1997:226). And the solid historiographic achievement of these works has indeed drawn praise from intellectual historians (see esp. Gould 1990).

But what has any of this to do with Merton as sociologist, as distinct from a moonlighting intellectual historian? Here a striking point to appreciate about all of these writings is how much they depart from the conventional genres of the intellectual historian. This is so because Merton’s historical studies offer very little in the way of detailed textual exegesis, analysis of the life and times of particular thinkers, or examination of the evolution of specific intellectual movements or doctrines.<sup>3</sup> To be sure, historical particulars deeply interest Merton (see below). Here, as elsewhere in his sociological work, however, his tendency is to regard the particulars as instances of something broader. To this end, he is careful to present his historical projects—even when they deal with recent

intellectual developments in which he himself played a central role—each as an “episode [that] provides a strategic research site” or a “case study” (1995b:380, 1977:77, [1982] 1984:263, 1995a:4): that is to say, a case study in sociological semantics, his “research program” on “culturally strategic words” and related terms.

As to the features of this program, however, Merton was laconic, reticent to put forth his novel agenda too baldly. This hesitancy recalls Stinchcombe’s comment (1975:26–27) about Merton’s reluctance to formulate his signature approach to social structure as a fully general theory. So, just as Stinchcombe was led to reconstruct Merton’s general theory of social structure from its component parts, Merton’s research program on sociological semantics must be drawn out and assembled from his various writings on the subject. When one undertakes this reconstruction, however, what emerges is a coherent sociological program tacitly based on four central tenets (see also Zuckerman, Chapter II of this volume).

The *first* of these tenets is Merton’s claim that *ideas, as well as their linguistic carriers, constitute a wide and important area for sociological investigation*. Spanning across the writings under consideration here, one sees Merton devoting attention to the history of aphorisms, citations, coinages, concepts, credos, dicta, eponyms, ideas, linguistic innovations, maxims, neologisms, niche-words, paradigms, phrases, proto-concepts, pseudo-facts, quotations, slogans, terms, theorems, and (most simply) words—to alphabetize his expansive (and not especially tidy) vocabulary. On two occasions (1997, 2004b), he pointedly takes as his epigraph Lucien Febvre’s maxim that “in writing the history of a word, one never wastes one’s effort; whether the trip is short or long, monotonous or eventful, it is always instructive”;<sup>4</sup> and in his semantic investigations, Merton explicitly identifies multiple reasons why words, in all their varied manifestations, furnish highly instructive objects of analysis for the sociologist. Specifically regarding “new words and phrases” in the natural sciences, the social sciences, and the humanities, for example, Merton observes:

Intellectual life requires new expressions. In the natural sciences . . . new concepts, facts, and instruments require new words to designate them, and scientists are, in fact, continually coining such words. It is easy to justify the need for neologisms in the natural sciences—the newly designated element, fact, or uniformity is new in the sense of having been previously unknown . . . In the social sciences and in the humanities, new words and

phrases have other functions. The use of a new characterizing word or phrase, the drastic redefinition of an old word, the resurrection of a term fallen into disuse is *an integral part of the development of new perceptions and interpretations*. The social scientist must often use new terms to distinguish the systematic abstractions he makes . . . from the commonsense abstractions of the layman. [Hence,] *the sheer importance of words in the social sciences*. The humanist who is seeking to reinterpret human experience often uses new words or phrases to reexpress “old truths.” (Merton and Barber [1958] 2004:67 [emphases added])

Turning from words that are new to more extended linguistic configurations of greater age, Merton (writing with Sills) stresses as well the significance of familiar quotations, advising researchers to take “the frequency and nature of quotations in society as objects of study in themselves” and pointing out the diverse social functions of quotations, including their capacity to “serve as instruments for the intergenerational transmission of knowledge,” scientific and literary knowledge in particular (Sills and Merton 1992a:75). Likewise, looking in *Mass Persuasion* beyond the academic realm to the broader public sphere, Merton describes the decisive role of popular “slogan[s in] crystalliz[ing] and epitomiz[ing] the feelings and the tensions” of the men and women who were involved in the wartime bond drive with which his study deals ([1946] 2004:33). Generalizing this last point, Merton elsewhere (with Sills and Stigler) emphasizes “the power of simple phrases, aphorisms, slogans, dicta—their ability to summarize, epitomize, exemplify, or even create complex programs of research or action” (Merton, Sills, and Stigler 1984:319 [emphasis added]). Repeatedly, his individual semantic projects attest by means of empirical examples to this same conviction: namely, to Merton’s belief in “power of phrases . . . and the ideas behind them” (Merton, Sills, and Stigler 1984:319). Arguably, this insight stands as one of his most distinctive contributions to the sociological tradition.<sup>5</sup>

But Merton then adds a *second* plank to his research program. Having brought ideas and their semantic expressions into focus, what he then proposes is that *the sociologist should examine the origins of these ideas and expressions and their paths of diffusion*—their “travels and adventures,” as he likes to say (e.g., Merton and Barber [1958] 2004; Merton, Sills, and Stigler 1984:319). With this step, he foregrounds two of the most central sociological questions that such phenomena raise. On several

occasions, Merton tellingly refers to his historical inquiries as biographies, biographies of a novel kind: “the biography of a sociological idea” ([1965/1985] 1993:25, 1995b:379n2), the “biography of an idea” ([1982] 1984:267), the “biography of a theorem” (1987:25), the “biography of a concept” (1995a:4)—shorthand in each case for an analysis of the focal object’s beginnings as well as of its subsequent course of historical development. And, in each of these instances, these are exactly the issues that Merton’s account then covers, as he implicitly forges a model for future studies in sociological semantics. Regarding beginnings, for example, he traces the aphorism “on the shoulders of giants” to its moment of “origin” ([1965/1985] 1993), proceeds likewise with the words “serendipity” ([1958] 2004) and “scientist” (1997) (see also Merton 1975), analyzes the “formation” of the concept “socially expected durations” ([1982] 1984:263) and of several key concepts in the sociology of science (1977:75ff.), and probes the “emergence” of the idea of “opportunity structure” (1995a:3ff.). As he studies the birth of such words and ideas, moreover, Merton also considers instances of stillbirths and entirely adverted moments of conception—he thus writes of intellectual opportunities that were a “total miss” (as well as some that were a “near miss”)—viewing these as possibilities that were foreclosed, abandoned, or overlooked as a result of the conceptual and linguistic choices of historical actors (1977:51, [1985] 1993:xx). This line of inquiry embodies his commitment to Kenneth Burke’s doctrine that “a way of seeing is also a way of not seeing—a focus upon object A involves a neglect of object B” (Merton 1977:95, quoting Burke 1940).

In addition to the question of origins, Merton examines the forms of diffusion that concepts and other expressions undergo historically. Here, the dominant theme of his analysis is that the “fate” of any expression is “contingent,” entirely dependent on later developments, viz., on “what others make” subsequently of the newly created word, phrase, idea, etc. (1977:107, [1985] 1993:xx).<sup>6</sup> According to Merton, these subsequent “responses [can] vary . . . from out-and-out rejection of the word, to passive recognition of its existence, to active interest in . . . its continuing usage, . . . to the taking for granted of both its meaning and usage” (Merton and Barber [1958] 2004:61). Yet another alternative is the eventual abandonment of the expression due to its debasement or overusage (Merton and Barber [1958] 2004:65). Among these possibilities, “resistance,” traceable to the “dispositions” and interests of the members of potentially recipient social-intellectual “communities,” is an espe-

cially commonplace outcome (1977:107–08, 1997:230, 233), though even those expressions that survive may continually meet “startling changes in [their] meaning” as they become “slightly or drastically modified by the social context of [their] use” (Merton and Barber [1958] 2004:51, 4). Complicating this situation further, “initial diffusion”—which itself may occur quickly or following decades of delay—must be distinguished from “secondary (derivative or serial) diffusion” (1995b:385, 388). For, at later points in time too, the possibilities are multiple. In the instance of quotations, for example, Merton distinguishes how successive users may alternatively “echo,” “parody,” or “reverse” the wording or the sense of a previous statement, as well as “misattribute” or “obliterate” its original source (Sills and Merton 1992a, 1992b).

Diverse as they are, however, these outcomes are not random. To the contrary, as Merton suggests via his *third* programmatic move, *sociological analysis can identify the general social processes and mechanisms responsible for turning such episodes in the directions that they took historically*—whether that of “successful” or “failed” emergence, “successful” or “failed” diffusion, or any of the numerous variations in between. Examining, for example, how historian-philosopher Thomas Kuhn came to develop during the 1950s his distinctive views of science, Merton unpacks Kuhn’s early academic career and uncovers therein processes of “institutional serendipity,” the action of “local influentials,” and the self-reinforcing dynamics of “the reward system” in higher education (1977:80–105). Likewise, probing the origin and diffusion of the concept of opportunity structure in American sociology in the mid-twentieth century, Merton (1995b) points to some of these same processes, as well as to the mechanisms of “oral publication,” “student-mentor ambivalence,” and “socially organized skepticism.” And, in an analysis of the fractured diffusion among sociologists of the original source of the famous “Thomas theorem,” Merton takes account of additional processes such as the simultaneous appearance of multiple independent discoveries and “the Matthew effect” (1995a:382).

By no means does Merton claim that these specific processes are always operative. The particular processes just named are processes identified and described elsewhere in Merton’s oeuvre, chiefly in the writings that make up his sociology of science (see esp. Merton 1973, 1980); and they return in his analyses of Kuhn, the concept of opportunity structure, and the Thomas theorem because the modern academic milieu that Merton examines in these case studies happens to overlap substantially with the world of

modern science, thus furnishing a locus for many of the same features—the academic reward system, the Matthew effect, organized skepticism, etc. Whether and to what degree sociologists would find the same processes or, instead, uncover different mechanisms in other contexts—say, in the kinds of contexts where political slogans originate and diffuse—is a question that Merton leaves open for researchers who investigate these other contexts. However, with regard to the academic context that Merton does consider in the studies under discussion, an important point bears notice. Critics of Merton's sociology of science have frequently faulted his approach for neglecting the *content* of scientific work, that is, for directing attention to the social-organizational processes characteristic of the scientific enterprise but overlooking the formation and development of scientific ideas, concepts, etc. Merton's semantic studies, however, significantly belie this charge, for when he invokes the academic reward system, the Matthew effect, organized skepticism, and related social processes in his semantic studies, Merton does so in order to address matters of content explicitly—the origins of Kuhn's ideas, the emergence and spread of the opportunity structure concept, the partial diffusion of the Thomas theorem. In these works, in other words, such processes and mechanisms become integral to Merton's account of the substance of the intellectual changes that he examines.

If this is Merton's analytical procedure, it would nonetheless seem to beg an overarching question. However well mechanisms of the sort he refers to in the studies just cited capture the social processes by which the ideas and concepts at issue originated and then spread, still absent is an explanation for why these processes, as opposed to other processes, obtained in the instances where Merton finds them: why, for example, the mechanisms relevant to the emergence and diffusion of Kuhn's ideas only partly coincide with those implicated in the emergence and diffusion of the concept of opportunity structure? Merton's program for sociological semantics is not yet done, however. Rather, with the addition of its *fourth* and final component, he holds that *the sociologist can construct an explanation for the processes and mechanisms that operate in a particular episode by analyzing the social-structural position of the historical actors involved in the genesis and diffusion of the ideas and expressions under investigation.*

At different moments in the development of his semantics program, Merton articulates this explanatory argument using a somewhat different vocabulary. For instance, in his study of serendipity, his explanatory thesis is that linguistic terms acquire new meanings as they are “refracted through

the patterns of thought of different *social and intellectual circles*” (Merton and Barber [1958] 2004:65 [emphasis added]), whereas *On the Shoulders of Giants* observes how the aphorism in question mutated according to different “contexts” and their accompanying patterns of “*social relations*” ([1965/1985] 1993:5, 134 [emphasis added]). After his work on the edition and translation of Ludwik Fleck's *Genesis and Development of a Scientific Fact* (1979), Merton occasionally used Fleck's concept “*thought collectives*” (e.g., 1987:1 [emphasis added]). Almost simultaneously and continuing for the rest of his career, however, he gravitated toward a family of related concepts of his own coinage.

These are Merton's concepts of an “intellectual microenvironment” (1977, 1984), a “cognitive microenvironment” (1995a), or what he finally calls “*a sociocognitive microenvironment*” (2004b:260–69 [emphasis added]; cf. 1995b; the first use of the latter term seems to be 1995a:19). By these equivalent terms, he means in the first instance the local “social and cognitive network,” or “sociometric structure,” in which men and women of ideas engage in “direct interaction” with one another (1977:99, 73, 1995a:5). In Merton's view, such “interpersonal milieux” constitute the “structural contexts” that lie at the core of sociological explanations for the “formation of ideas” and the ways in which ideas, along with the expressions that carry them, subsequently diffuse (1977:73–75, 93, 1995a:5).

But why assign so much explanatory significance to sociocognitive microenvironments? Merton makes clear that he does this for the reason that a sociocognitive microenvironment constitutes an “opportunity structure” which furnishes differential access to ideas, concepts, information flows, and other resources to those actors who self-select, or are institutionally selected, into such a milieu and who then differentially make use of the sociointellectual possibilities that its reward system encourages or discourages (1977:75–77, 89–93, 1995a:8–9ff.).<sup>7</sup> In addition, different local microenvironments differ in the extent to which they are sites of the processes mentioned above (institutional serendipity, practices of oral publication, socially organized skepticism, etc.) and, hence, of the sociointellectual effects of these mechanisms (Merton 1977:102 speaks of “serendipity-prone microenvironments,” a concept he later elaborates [2004b]). Also relevant, however, are the trajectories of women and men of ideas across “*successive microenvironments*”—since the order of succession can reinforce, complement, or nullify the impact of a prior microenvironment—as well as the location of these actors both in nonlocal “extended networks” operating

“at-a-distance” (e.g., “invisible colleges”) and in the larger “macro-environment” (1977:86, 99, 5 [emphasis added], 1995a:34, 44, 1995b:410).

Merton mobilizes this general explanatory argument throughout his late semantic studies but, importantly, not in a one-size-fits-all manner. Rather, he goes to lengths in each instance to specify the argument. For Merton, how the various factors just identified happen to operate (and thus to shape the emergence and diffusion of ideas and other linguistic expressions) is something that is contingent on the historical circumstances of the case, that is, on the particulars of the structural contexts—the specific sociocognitive environments—under examination. Accordingly, Merton urges “fine-grained analysis, [such as is] possible in an individual case-study,” the “tracing [of] the *fine-grained* social-and-cognitive interactions that have affected [the] work” in question (1977:101, 84 [emphasis in original]). To this end, each of his own case studies (esp. 1977, 1995a, 1995b, 2004b) draws on a range of historical materials—including, for the projects on Kuhn, the Thomas theorem, and the concept of opportunity structure, correspondence in which he himself was involved—to carry out a detailed reconstruction of the pertinent microenvironments and the trajectories across them of the relevant historical actors.<sup>8</sup>

The result is a series of writings substantially at variance with the Coser-Jones claim that Merton’s approach to the history of ideas is an ahistorical one which “strips [away the] time-and-place-bound elements from the intellectual productions of the past” and fails to yield accounts that have historical validity. Indeed, rather than “remove those layers and tissues . . . that show the mark of [thinkers’] time, place, and milieu,” Merton’s case studies incorporate precisely these elements as the necessary means to instantiate and ground his general argument about microenvironments and to establish its validity in regard to specific historical examples. In this way, he takes a research program which starts from an interest in the historical importance of particular ideas, concepts, words, and other expressions, which seeks to understand the historical origins and diffusion of those expressions, and which examines the social processes and mechanisms underpinning these historical developments, and he then caps this program with an explanatory account that only comes to life when historically specified. To be sure, Merton regards his semantic studies not as completing this program but simply as pointing forward to future research; but this qualification by no means diminishes his accomplishment. Unfin-

ished though it is in his hands, Merton’s program constitutes a historical sociology of ideas which has no equivalent in the annals on scholarship and which remains vital, opening up fertile territory that sociologists have yet to explore and going further still to richly exemplify how to conduct this original path of inquiry so as to contribute at once to the historical understanding of the intellectual past and to the present advance of a nascent subfield of sociology.<sup>9</sup>

### III

What then, if anything, is the relationship between the Merton of Section I and the Merton of Section II? The simple answer is that Merton did not say. More than this, he apparently felt no need to address the question, or even to raise the matter as an issue, satisfied with the harmonious coexistence between his “systematics of sociological theory” and his “sociological semantics.” This, at any rate, is a reasonable inference from those autobiographical occasions when Merton placed *Social Theory and Social Structure* and *On the Shoulders of Giants* (his favorites among his works) side by side, contrasting them solely in terms of style of argument and mode of presentation (see Merton [1994] 1996).

Viewed in terms of Merton’s career, this is not surprising, for the systematics and the semantics were the products of different periods and problematics, and for many years they remained essentially independent paths of intellectual interest. Merton’s program to develop the systematics of sociological theory and (in pursuit of this program) his concern to distinguish systematics from the history of sociological theory and to dissuade sociologists from exegeses of older theories lacking in contemporary relevance was a line of work that crystallized in the mid-1940s amid a debate in American sociology, particularly with Talcott Parsons, over the nature of sociological theory and about the practices that could foster theory development within the field of sociology (see Sztompka 1986). The semantics program began to take shape a decade later when Merton’s research in the sociology of science combined with his knowledge of the history of ideas to draw his attention to certain expressions—“serendipity,” “on the shoulders of giants”—which illuminated salient aspects of modern science and whose origins and diffusion invited historical investigation (see Merton 2004b). In conducting historical studies of these

particular expressions, however, Merton was in no sense writing the “history of *sociological theory*”; hence, his strictures on historical work of that kind were hardly pertinent.

The two programs veered toward each other only subsequently. This occurred when Merton not only extended his semantic research program to include all manner of other strategic words, terms, phrases, slogans, maxims, and the like, but went even further and actually carried out *historical case studies of ideas and concepts from sociological theories of the past*—e.g., the Thomas theorem. At this point, he was engaged in producing chapters in the history of sociological theory which had little evident bearing on the present-day systematics of sociological theory—and a hasty assessment of these writings might conclude that Merton’s late practice was in this way in conflict with his earlier teachings.

This discrepancy is more apparent than real, however. It derives from entangling two separate issues that may arise with regard to past sociological works: (1) Do these works contain material that is relevant to the contemporary systematics of theory?; and (2) Do these works furnish instructive objects for sociological analysis: that is, ideas, concepts, words, and other linguistic expressions whose historical emergence and spread are ripe for sociological explanation? Only to the extent that these questions are interlinked, such that a negative answer on the first precludes asking the second, are Merton’s systematics and semantics at odds. For Merton himself, however, these two issues are disconnected and orthogonal. Consequently, regardless of the contemporary usefulness of, say, the Thomas theorem for theories in organizational sociology or social psychology—and, from Merton’s standpoint, this is indeed a question that sociologists in these areas should pose as a precondition for pursuing this aspect of W. I. Thomas’s work—the genesis and diffusion of the theorem remains a compelling research topic for sociologists seeking to further the project of sociological semantics.

This fundamental and neglected distinction only comes to light, though, when one considers Merton’s program for the systematics of sociological theory and his program for sociological semantics in tandem. Insofar as scholars keep to the received wisdom and examine the systematics of sociological theory in isolation, they will almost inevitably continue to overgeneralize Merton’s argument on this score, interpreting it to require a more restricted and ahistorical approach to intellectual history on the part of the sociologist than is consistent with Merton’s oeuvre

as a whole. This standard interpretation of Robert Merton, however, not only misrepresents the implications of his systematics, it also obscures his major and still untapped achievement with regard to the historical sociology of ideas.

## Notes

In 2004, the editor of the journal *Contexts* asked me to write a review of Robert Merton’s book (with Elinor Barber) *Serendipity* and to frame the review by saying something about Merton’s intellectual career more generally. When I finished drafting my review, I sent it to Harriet Zuckerman for suggestions; these she very generously offered, adding that I should read Merton’s 1997 companion essay “De-Gendering ‘Man of Science’: The Genesis and Epicene Character of the Word *Scientist*.” The present chapter is the product of the research that resulted from that fruitful recommendation, and I am deeply grateful to Harriet Zuckerman for leading me to this line of research, which (as I have since learned) converges in several ways with her own recent work on Merton’s legacy, including her chapter in this volume. In the period since, I have also benefited from reading her chapter as well as from her very extensive comments on previous drafts of the current chapter.

1. One should not construe this passage to imply an aversion on Coser’s own part to studying the history of sociological thought in a comprehensive manner. To the contrary: Coser saw many advantages to reading the work of earlier sociological thinkers, and he commended Merton’s determination “to inventory the whole storehouse of European sociological and social thought and to select a much greater array of ideas from a much wider variety of sources” than had American sociologists who preceded him (1975b:88).

2. The singular and outstanding exception to this statement is Harriet Zuckerman’s chapter in this volume.

3. Cf. Merton (1977:75), where Merton himself distinguished his approach from that of the intellectual historian.

4. On both occasions, Merton also cites Balzac: “What a beautiful book would one compose if one narrated the life and adventures of a word.” (In both instances, Merton leaves the two quotations in French; I owe the present translations to Ivan Ermakoff.) The quotations bear comparison with Whitehead’s statement, which Merton made famous by using it as the epigraph of *Social Theory and Social Structure*: “A science which hesitates to forget its founders is lost.”

5. Merton quotes a 1978 letter of his to Albert Cohen in which he casually comments: “I truly believe that important ideas generally have a lot of consequences” (1995a:43).

6. One of the principal arguments of Bruno Latour has been that “the fate of a [scientific] statement is in later users’ hands” (1987:59), and scholars in science studies

often associate this notion with Latour. Merton, however, entered this principle into the literature of the field well in advance of Latour.

7. Here, one sees Merton deftly tailoring what Stinchcombe (1975) constructs as Merton's general theory of social structure specifically to fit the questions at stake in his sociological semantics.

8. That Merton pursued this detailed reconstructive work into his 80s and 90s is indicative of the significance that he attached to it.

9. For a more general discussion of this subfield—the sociology of ideas—see Camic and Gross 2001.

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