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The Place of Marxism in History

ERNEST MANDEL

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Introduction

To understand Marxism, we must first set it in its historical context. We must understand when it was born and how it arose. We must explain its emergence and development by the interaction of social forces: their economic nature, their material interests, their ideology, the people who formulated their aspirations. In other words, we must apply the materialist interpretation of history to Marxism itself: not consider its appearance as a matter of course, but understand that it requires an explanation, and try to provide one. Furthermore, determining the place of Marxism in history will enable us to outline more precisely its content and historical importance.

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The General Historical Context

In the last analysis, Marxism is the product of the appearance of the capitalist mode of production in certain regions of western Europe (northern and central Italy, the Netherlands, England, and parts of France, Germany, Bohemia, and Catalonia), beginning in the fifteenth and sixteenth centuries and leading to the emergence of a new bourgeois society that gradually came to dominate all spheres of human activity. The capitalist mode of production is based on private ownership of the major means of production and subsistence (implements, land, food) by capitalists, that is, owners of large sums of money. The latter use part of their capital to buy the labor power of another social class, the proletariat, which is compelled to sell them its labor power because it no longer has access to the means of production from which it could produce its subsistence. This antagonistic relation between capital and wage labor accompanies the generalization of commodity production (the transformation of the means of production and labor power into commodities) and is at the core of the new mode of production.

This new mode of production arose in the midst of a society—feudal society—whose slow decomposition spanned a long and contradictory transitional phase running, in the regions of western Europe mentioned above, from the thirteenth century to the sixteenth century, sometimes to the eighteenth century, with sequels even later in some cases. This transition is often designated by the term "semi-feudal." It was based on petty commodity production in which the main producers—peasants and craftsmen—were free producers using their own means of production, rather than serfs. The capitalist mode of production only emerged when these free producers were gradually stripped of their means of production and of free access to the land.

The capitalist mode of production appeared initially under the guise of commercial farms, cottage industry, and manufactures. In the first, the

producers (peasants) were dispossessed of their working implements (land, cattle, tools) and hired as agricultural workers or domestics by a farmer who produced for the market. In the second, the producers were also dispossessed but produced at home on orders from a capitalist merchant. In the third, the dispossessed producers were already concentrated in large numbers under the same roof. Farmers, merchants, entrepreneurs and their wage workers began to constitute a domestic market for commodities (food, clothing, tools, consumer goods).

It should be emphasized that this initial form of the capitalist mode of production was neither hegemonic nor consolidated. At this stage of historical development, the bourgeoisie had not yet conquered political power anywhere, except in the northern Netherlands and a few cities like Geneva. Even there, power was wielded by bankers and big merchants, the most aristocratic faction of the bourgeoisie.

The state remained a semi-feudal state (often an absolute monarchy). Most privileges of the nobility and clergy survived, but these classes—the ruling classes of feudal society—were getting progressively poorer than the bourgeoisie and slowly decomposing. Most important, wage earners strictly speaking only accounted for a small minority of the producers, the great bulk of which was composed of peasants, either free (petty commodity producers) or still partially subject to vestiges of serfdom.

The capitalist mode of production was only consolidated and imposed definitively with the advent of the Industrial Revolution in the second half of the eighteenth century. It was later to extend throughout the world on the basis of the factory system based on machinism; that was the point at which it fully revealed its fundamental features. Only then could it be fully understood and its laws of development (its internal dialectic) grasped.

Machinism, the basis of the modern capitalist factory, was the result of the slow transformation of artisanal and industrial implements from the thirteenth century onward (water mills, progressive techniques of agriculture and animal husbandry, mining techniques, etc.), ultimately leading to the use of a new source of energy in production: steam power. This transformation was stimulated from the sixteenth century onward by the progress of the natural sciences whose advances were applied to the technology of commodity production and circulation with increasing speed.

One of the most spectacular results of this advance of applied science was the breakthroughs in navigation and shipbuilding science. These

made possible the great discovery and plundering expeditions launched from Europe toward southern and eastern Africa, Asia, and the Americas in the sixteenth century (e.g., 1492: Christopher Columbus "discovers" America), triggering an enormous expansion of international trade. A genuine world market for so-called colonial products was created, while the market for food items extended to all Europe, to be followed some time later by the market for manufactured goods. In turn, this world market would stimulate the expansion of the capitalist mode of production.

But, eventually, the rapid advance of the natural sciences combined with the expansion of the capitalist mode of production also entailed an upheaval in the way of life, the activities, and the patterns of thought of the urban masses, whether part of the new bourgeoisie, the petty bourgeoisie, or the first forerunners of the modern proletariat. It also influenced sectors of the rural masses, at least in certain countries.

The main feature of feudal society was the rigid stability of human existence. Each individual had his or her "station in life" and "remained where they belonged." Children of serfs were serfs. Children of nobles were nobles or joined the upper clergy. Children of craftsmen became craftsmen. An equally inflexible religious ideology—the Catholic religion bolstered by Scholasticism—crowned, rationalized, and justified this extremely hierarchical society.

True, this was not an absolutely rigid society. Along with technology, thought and social criticism experienced significant breakthroughs inside European feudal society, particularly in the thirteenth century. Philosophy registered some advances; the "Avicennian left," for instance, a current of Islamic origin, came close to materialism.* The expansion of international trade stimulated intellectual practices (like accounting) that fostered rationalist thought. But all these advances were slow, contradictory, and subject to grave regressions toward religious control (the creation of the Inquisition) and obscurantism, especially in the fifteenth century, in line with the generalized crisis of feudal society.

Beginning in the sixteenth century and with the emergence of the capitalist mode of production, the ideological and cultural climate changed in tune with the radical change in daily life and outlook of the urban populations. The feeling that everything changed, and fast, replaced the feeling that there was an eternal frozen order. Doubt,

*See Glossary, p. 87

challenges to "established values," the critical examination of allegedly "divine laws" as well as human institutions, spread further and further. Religious dogmas were the first to be subject to revision under the combined impact of advances of the natural sciences, the extension of critical thinking, and revolts against the clergy's abusive practices, privileges, and corruption. Thus, quasi-atheistic humanism, the Reformation (Lutheranism, Anglicanism, Calvinism, and Puritanism), and rationalist-naturalist philosophy (Galileo, Descartes, Spinoza) developed side by side.

In the last analysis, these ideological movements expressed the aspirations of the new urban and rural classes developing along with the capitalist mode of production: the bourgeoisie, the petty bourgeoisie of functionaries and ideologues (teachers, erudites, artists), the independent craftsmen, the pre-proletariat (who earned wages only part of the year), and the capitalist farmers. Each of these classes identified wholly or in part with variants of the new religion and the new philosophical currents.

The ideological struggle took an essentially religious form, a fact that can be explained by the role of religion as the hegemonic ideology of feudal society, an ideology which deeply impregnated the education and daily life of all classes of society. But the struggle was no less a real *class struggle*, as was demonstrated when these religious conflicts turned into civil wars and even genuine revolutions ending with major social and political battles such as: the revolt of the Hussites in Bohemia in the fifteenth century; the Peasants' War in Germany, the revolution of the Netherlands, the insurrections of Ghent and the Commune of Münster (linked to the Anabaptist movement) in the sixteenth century; the Religious Wars in France in the sixteenth and seventeenth centuries—all leading up to the English Revolution of 1640–1688.

Given the relative weakness of the bourgeoisie in the sixteenth and seventeenth centuries, these movements were only partially victorious. They often ended in defeat. On the heels of the Reformation came the Counter-Reformation, which triumphed under the Jesuits in Italy, Spain, the southern Netherlands, Austria, and parts of Germany. In the political field, absolute monarchy, not the bourgeois republic, gained ground. Many sequels of the Middle Ages—serfdom, arbitrary judicial procedures (including the Inquisition and torture), censorship, and the listing of "seditious" publications on the Index—survived. Galileo was forced to recant publicly and admit that he had been wrong when he demonstrated that, contrary to what was said in the Bible, the earth revolved around the sun, not the reverse.

Progress combined with regressions everywhere in the world. European colonization led to the extermination of Native Americans. Commercial capitalism organized the slave trade, devastated Africa, and operated plantations, mines, and manufactures in the Americas, not with free proletarians, but with millions of slaves.

Only with the advent of industrial capitalism in the second half of the eighteenth century did the hope of progress and social optimism become widespread. Under the leadership of the bourgeoisie and its revolutionary ideologues, all the remains of the semi-feudal order were easily challenged, attacked, and ridiculed. The assault on absolute monarchy turned into a general assault on the social order that underpinned it, and into an ever broader triumph of the new bourgeois society in all fields of social life. These victories in the field of transformation of customs, ideas, and recognized "values" eventually led to the great bourgeois revolutions of the eighteenth century: the American Revolution of 1776 and the French Revolution of 1789. This movement continued in Europe and Latin America in the early nineteenth century, with uneven success in different countries.

These revolutions were also the end product of a widespread new awareness among the bourgeois, petty bourgeois, and pre-proletarian layers: the perception that *humanity could decide its own future*, that its destiny was not predetermined by divine Providence or some immutable fate. Faith in human reason as the motor of human emancipation; that was the formula that best summed up the "spirit of the times" of the Enlightenment. After gaining the upper hand in the natural sciences and technology, this spirit of the times broke through in the criticism of state institutions, in philosophical and literary activities, in the arena of political struggle. Driven by a radical upset of the relationship of forces between the bourgeoisie on the one hand, and the monarchy, nobility, and clergy on the other, this emancipatory thrust found its supreme expression in the two great revolutions of the eighteenth century.

But as the capitalist mode of production grew, the contradictory aspect of bourgeois society—the ambivalent and contradictory nature of the economic and political progress carried by the extension of bourgeois society and bourgeois revolutions—appeared ever more glaringly. Capitalism meant not only a colossal expansion of knowledge, wealth, and human rights; it brought in its train, also, deprivation, injustices, oppressions, and denials of human rights. The polarization of society between rich and poor was such that all observers, even writers known for their reactionary outlook, like Balzac, and conservative ideologues,

recognized it. Along with this new awareness came a new social practice: the class struggle of the workers-craftsmen, the pre-proletarians (sansculottes, *bras nus*, Diggers), and proletarians against the capitalists. Whereas in the past, the entire Third Estate had struggled against the monarchy, nobility, and upper clergy, now the "Fourth Estate" progressively emerged from the Third Estate and turned against it. This struggle came to dominate the political and social scene.

The weakening of the absolute monarchies and the emergence of mass revolutionary movements made it possible for various oppressed social layers to express their demands, often on the basis of a more radical interpretation of the principles of democracy. Equality between individuals was to be extended to individuals of both sexes. Thus, a "Declaration of the Rights of Woman and Citizen" emerged in the midst of the French Revolution. Equality should not allow for caste or race discrimination: thus began the emancipation of the Jews, the movement for the abolition of slavery, the extension of universal suffrage. Finally, it implied equality between nations and their right to self-determination; hence the rise of national democratic movements, notably in Ireland, Italy, and Germany.

The new economic reality and class political practice also generated new scientific questions and new ideologies. Should emancipation be confined to the "citizen," that is, to juridical and political human rights? Or should it not be extended to the producer, the exploited, to "economic man (and woman)"? Thus, looming at the end of the Enlightenment, there stood the social question, the question of economic emancipation, and, with it, socialism as an ideological current and as a real movement working for that emancipation.

This, then, is the evolution and historical context that made possible the birth of Marxism: from the emergence of the capitalist mode of production to the birth of machinism and the modern factory; from the emergence of a proletariat concentrated in factories to elementary proletarian class struggle; from the resistance of colonized peoples against new capitalist forms of exploitation to the emergence of radical independence movements (Latin America, Ireland, etc.); from the appearance, at the climax of the great bourgeois revolutions, of revolutionaries whose goals were no longer determined exclusively from the vantage of the revolutionary bourgeoisie to the initial formulation of socialist goals on behalf of the young proletariat; and from radical bourgeois rationalism to its supersession by critical and lucid social sciences that

began to unveil all the hidden motive forces of history and the "social order" in general (that is, class-divided society, private property), and were unwilling to confine their criticism to the boundaries of the semi-feudal order.

Socialism, the idea of a return to some "Golden Age," that is, a classless society, is much older than industrial capitalism. It is practically as old as class-divided society itself. We hear its echo in ancient Greek poetry and in the philosopher Plato, in the writings of the Hebrew prophets and first fathers of the Catholic church, in the work of many thinkers of classical China and Islam. This tradition grew and spread during the Middle Ages and through the great ideological movements of the fifteenth century onward. It was fostered by the existence of relatively egalitarian societies encountered by Europeans in the course of their voyages of discovery and colonization campaigns.

Marxism undoubtedly stands in the continuity of this old and venerable tradition of dreams and emancipation struggles of the poor, exploited, and oppressed. It shares their questions, protests, concerns, and revolts. But all that is specific to Marxism can be explained in the last analysis only by what was new in the eighteenth century and intimately connected to the consolidation of the capitalist mode of production by the Industrial Revolution: the definitive emergence of the proletariat as a social class based on wage labor; and the radical awareness of the "social question" born of the new social antagonism, that of capital and wage labor.

2

The Fundamental Characteristics of Marxism

Marxism emerged at once as a revolutionary transformation and a progressive unification of:

- the social sciences;
- the political emancipation movement, mainly the revolutionary organizations born of the far left of the French Revolution;
- the elementary and spontaneous workers movement, created by the workers themselves outside of any philosophical or sociological theoretical school;
- pre-Marxist socialism, that is, the drafting of projects for a better society and other "solutions to the social question" at a primarily theoretical and ideological level: philosophical, sociological, economic theories combined with educational and philanthropic activities (foundation of the first "communist" colonies).

In each of these fields, Marx and Engels started from what already existed, fully assimilating and then submitting to critical examination the advances accumulated before them. They thereby radically transformed those advances, all the while preserving everything they considered fundamentally valid.

In the field of social science, their critical appropriation concerned mainly classical German philosophy, English political economy, and French sociological historiography, which had discovered and applied the concepts of social class and class struggle.

In the field of the social emancipation movement, Marx and Engels picked up the continuity of revolutionary action and revolutionary organization developed by Babouvism and Blanquism, while combining them with the lessons drawn by the first German revolutionary organizations, which they knew, lessons which motivated the creation of the

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Communist League, which they joined. They integrated the radical democratic demands of organizations fighting absolutism and trying to establish democratic republics in Italy, Ireland, Spain, or to abolish slavery in the United States, Brazil, and European colonies. They also strove to integrate the lessons drawn from the first experience of a mass workers party, the Chartists of Britain.

In the field of socialist thought and organization (which was predominantly nonrevolutionary and even nonpolitical), they attempted to introduce a scientific analysis of bourgeois society, of its tendencies, dynamics, and future, and of the contradictions that would lead to its decline and fall. They applied this method notably to the analysis of women's oppression initiated by feminist utopian socialists. This effort was summed up as the attempt to transform essentially utopian socialism into scientific socialism. At the same time, Marx and Engels tried to base socialist thought and organization on the *necessity of political action*, that is, to fuse them with revolutionary organization and action.

Finally, Marx and Engels attempted to introduce into the elementary self-organization movement of the working class, above all, the program (the principles) of scientific socialism, of communism, which meant emphasizing both the socialist goal, as well as the workers' immediate needs, and revolutionary political action, as well as economic (trade-union, mutual aid) and educational action.

Marxism thus emerged as a quadruple synthesis:

- a synthesis of the main social sciences;
- a synthesis between these social sciences and the project of emancipating humanity;
- a synthesis between the project of human emancipation and the real self-organization and self-emancipation movement of the modern proletariat;
- and, a synthesis between the real workers movement and revolutionary political organization and action.

These syntheses have not been finalized once and for all. They are not dogmas and do not spring from any a priori and axiomatic bias other than the recognition that human beings are the ultimate goal of human beings, the only measure of all human action. They are therefore always *subject to new tests of practice*. They must be reexamined constantly in the light of new experiences and also of new data on the past, much of which is still not known to us.

Conversely, much of this quadruple synthesis is already based on an enormous body of knowledge derived from many experiences and profuse empirical data, and can therefore not be challenged light-mindedly on the basis of new partial and conjunctural data—that is, in an essentially impressionistic fashion. Moreover, such a challenge itself ought to be criticized and subject to revision in light of subsequent events, if these confirm the initial thesis.

More generally, these syntheses are based on an overall view of bourgeois society and human history in its successive modes of production; in other words, they are based on the capacity to lay bare the laws of development of a given society *considered in its totality*. Any fragmentary approach that would try to "do without" this overall view should be treated with the utmost caution. It almost always and inevitably leads to false analyses and forecasts that are not borne out by the facts.

Moreover, these syntheses always imply a critical appropriation of the data produced by the most advanced academic and scientific research combined with a critical analysis of the emancipation movement, including its various attempts to build revolutionary organizations, its various attempted solutions of "the social question," and the elementary self-organization and self-emancipation efforts of the working class. This critical appropriation continually moves back and forth between retrieval and innovation, in dialectical fashion.

In the Marxist approach, given the method of apprehending reality (that is, social evolution) adopted by Marx and Engels, this pendulum motion is unavoidable. Marxism does not believe in innate knowledge let alone intuition. Nor does it behave one-sidedly as the "educator" of the proletariat, or the "judge" of the historical movement (the various ups and downs of the class struggle). It constantly learns from perpetually changing reality. It understands that the educators themselves need to be educated, that only a collective revolutionary praxis, rooted on the one hand in scientific praxis, and on the other in the real praxis of the proletariat, can produce this self-education of the revolutionaries and all toiling humanity.

3

Marxism's Transformation of the Social Sciences

The Transformation of German Classical Philosophy

German philosophy's main contribution to Marxism was Hegel's dialectic, most of which Marx and Engels assumed as their own after transforming it, "setting it back on its feet."

The origin of dialectics is quite ancient. It is visible at the very dawn of philosophical inquiry, notably in the works of the Greek philosopher Heraclitus ("everything changes," "everything moves"; in Greek, *panta rei*) and in several Chinese thinkers like Kung-sun Lung and Tai Chen. It was subsequently developed by the Judeo-Dutch philosopher Spinoza (seventeenth century). German classical philosophy, incarnated by Hegel, one of the greatest thinkers of all time, brought it to its pinnacle.

The main advances of dialectical thought were:

- Conceiving all reality as in continual change, that is, not as *a sum of facts* but as a *combination of processes*.
- Conceiving all reality as a *whole* in motion, no part of which can be understood in isolation outside of its interconnections or its relations with other parts.
- Conceiving movement as the result of the *internal contradictions* of this whole.
- Conceiving knowledge as the apprehension of reality by thought (by human activity), that is, as an *interaction between subject and object*. The subject tends to transform reality as he or she apprehends it, but is himself or herself transformed by his or her effort to investigate, apprehend, and transform reality.
- Conceiving knowledge as the laying bare, through analysis and action, of the inherent *laws of development* of the processes apprehended. The dialectic of thought must conform to the dialectic of reality (to the real movement) to understand the latter.

This general methodology of effective, scientific thought—of thought advancing through successive approximations toward understanding the whole of reality—constitutes an enormous step forward in comparison with the purely analytical method of fragmentary knowledge, with its excessive specialization, based mainly on partial experimentation and formal logic.

Dialectics does not reject partial experimentation and formal logic. It incorporates them. But it also grasps their limits. It thus opens the way to interdisciplinary advances of knowledge, such as Marxism has achieved in the fields of history and economics, whose object is society as a whole, and which it will, sooner or later, extend to all sciences having humankind as their object.

Hegel's thought, stimulated by his experience of the French Revolution (in his youth, he had even belonged to a pre-Jacobin revolutionary group), advanced to the verge of a "qualitative leap" in several important areas: notably, that of the key role of social labor in human history. But the victory of the political counter-revolution in France and Europe and the immature nature of bourgeois society and the proletarian class struggle in the first two decades of the nineteenth century did not allow this great genius to go beyond certain limits of his thought. It thus remained flawed by the following weaknesses:

(a) He conceived dialectics essentially in the realm of ideas. For him, the movement of thought was fundamental in relation to the movement of material reality. In fact, he often identified the real with the ideal. In the last analysis, he reduced the dialectics of history to the dialectics of the "absolute idea." For him, the realization of freedom, conceived as the finality of history, a conception Hegel shared with the Enlightenment, that is, with the project of human emancipation that underpinned the entire struggle of the revolutionary bourgeoisie, was, above all, the realization of *spiritual* freedom: "A slave whose spirit is free can be freer than his master."

(b) The philosophy of history that emanated from this idealistic conception of dialectics was marked by an excessively abstract, quasi-metaphysical quality. For it was not concrete men and women—as they lived, worked, were exploited, and suffered, at the same time as they thought and experienced "their inner soul" and "moods"—who were the protagonists of history, the object of research, and the subject of the emancipation movement. Too often, he assigned that role to "spiritual beings," that is, to ideas and ideologies, including religions.

But this metaphysical flaw in Hegel's philosophy of history was tempered by several brilliant intuitions into the relations between labor (production), the organization of material life, and the state (the social structure), intuitions which led the German philosopher to the very edge of a genuinely materialist analysis of many historical phenomena.

(c) An idealist philosophy of history based on an idealist conception of dialectics could easily degenerate into an apologetic view of social reality, particularly of the state (the Prussian state) in which the philosopher was inserted.

Hegel's famous formula, "All that is real is rational; all that is rational is real," is not *automatically* apologetic, provided the verb "to be" is conceived dialectically as the equivalent of "to become, to be transformed, to grow, then to decline and disappear." It *can* mean: "All that is real survives only insofar as this reality corresponds to a necessity and, in that respect, to its own rationality. Insofar as this rationality declines and decomposes, insofar as its contradictions sharpen and become more and more explosive, this reality becomes more and more 'unreal,' that is, begins to decompose and therefore to disappear, to make way for a new, more rational reality." Likewise: "All that is rational, even though not yet fully realized, even though still merely potential, embryonic, will become more and more real, will gradually be realized in its entirety."

But the same, potentially revolutionary, formula can also be interpreted in a thoroughly conservative way. It then becomes: "All reality is rational (otherwise it would not exist), that is to say, necessary (the inevitable result of the processes that produced it). *It must therefore not be challenged.* All that is rational and necessary has already been realized. What has not been realized is neither (or not yet) rational, nor necessary; otherwise it would already have been realized."

In fact, both these parallel interpretations were present in Hegel's own thought. The former predominated in the works of his youth. The latter in the works of his old age. They gave birth to two schools, two lineages of disciples. The latter was characteristic of the "Old Hegelians," who supported the Prussian monarchy, religion, and the state, which, they claimed, embodied "virtue" (as in Plato and Aristotle) and the "Common Good," as opposed to "civil society," in which economic and social selfishness prevailed. The former brought forth the "Young Hegelians"; these were radical, anti-establishment, rebellious, atheistic (particularly Feuerbach) philosophers whom Marx joined in his youth, and whose merciless philosophical, historical, social, economic, and political critique he would continue.

In one of his least known youthful works, *Der Geist des Christentums*

(The Spirit of Christianity), Hegel even dared to write: "Only what has freedom as its object is the Idea. The state must therefore be superseded! For all states are called upon to treat free human beings as if they were dealing with the cogs of a machine (*Räderwerk*). And that ought not to be. It [the state] must therefore *cease*. . . . At the same time, I wish to establish here the principles of the history of humanity, that is, the whole miserable human labor of the state, the constitution, government and legislation—and bare it to the skin!" (G. W. F. Hegel, *Der Geist des Christentums*, Ullstein, 1978, p. 341; from French trans. by E. M.—Translator's note).

(d) Removed from material reality, idealist dialectics risks standing beyond the reach of any epistemological criterion, any ultimate instrument of verification. By the same token, it risks locking itself into a circular line of reasoning, and even falling into solipsism. It risks adopting a dogmatic bent in which the internal consistency of the reasoning alone serves as the ultimate justification of the system of thought, the final proof of its degree of truth, its veracity.

Marx and Engels tried to correct these weaknesses of idealist dialectics by "setting it back on its feet" (implying that Hegel had set it on its head, or upside down). In the process, they transformed idealist dialectics into materialist dialectics. The latter is based on the following observations:

(a) Material reality (nature and society) exists independently of the desires, passions, intentions, and ideas of those who try to interpret it. It is an *objective* reality, which thought seeks to explain. Naturally, the processes of cognition, of mastering knowledge (and therefore science, including social science), are themselves objective processes, potential objects of critical scientific examination.

(b) Thought can never identify totally with objective reality, if only because the latter is in perpetual transformation, and the transformation of reality always precedes in time the progress of thought. But thought can get closer and closer to objective reality. Reality is therefore intelligible. Thought and science can progress (though not necessarily in a linear and permanent manner); and this can be verified concretely and practically in human history by the consequences (verified predictions, successful applications, etc.), that is, the practical results, of these advances. The ultimate criterion of the veracity of thought, of science, is therefore *practical*. Thought is effective (scientific) insofar as its explanation of real processes is not only coherent enough to explain what already exists, but insofar as it can also be used to predict what does not yet exist, to

integrate this prediction into the interpretation of the real process considered as a whole, and to alter and transform reality in line with a preestablished goal. In the last analysis, knowledge is a tool of survival for humankind, a means by which this species can change its place in nature and, thereby, increase its viability.

(c) The dialectics of history is a dialectics of real and concrete human beings, not a dialectics of "the human in general" or "the human as an essentially spiritual being." Real and concrete human beings are socially and historically specific human beings; that is, beings determined by the specific social conditions in which they live, conditions which change in each given historical period.

(d) The real emancipation movement progressively unfolding throughout history, with its leaps forward and grave setbacks, is neither exclusively, nor essentially, nor even predominantly the spiritual emancipation movement. It is not in the first place a progressive conquest of spiritual freedom, but a progressive conquest of greater material space for life, for freedom, for the possibility of enjoying life. Spiritual, aesthetic, and other such pleasures undoubtedly occupy an important place in this range of possibilities. But the precondition for their satisfaction is the prior satisfaction of the elementary needs for food, shelter, health, sexuality, education, material access to culture, etc. The point is to free the individuals from the constraints that too close a dependence on the forces of nature impose on them. The point is to free them also from the constraints that too close a dependence on other individuals imposes on them.

The spiritual freedom of slaves is probably essential for their survival. But the fight for their material liberation—that is, for the abolition of slavery as a social institution and of the entire social structure that underpins it—is even more important in the long run. At any rate, history produced a real movement of the slaves themselves for their material emancipation. The program which Marx and Engels set for themselves in their youth, and to which they remained faithful their entire lives, was to fight all the institutions and all the conditions in which the human being is a miserable, exploited, oppressed, alienated, and therefore mutilated, being, incapable of realizing all his or her human potential. This was a radical break with any form of apologetic use of dialectics.

The fusion of materialist dialectics with the main discoveries of French sociological historiography, enriched by the main insight of English political economy—the centrality of social labor in human existence,

enabled Marx and Engels to elaborate their theory of the social evolution of humanity in a coherent fashion. Thus emerged the theory of *historical materialism*, also called "the materialist interpretation of history."

The Transformation of French Sociological Historiography

The observation that history was not made by great men, but fundamentally shaped by conflicts opposing large numbers of individuals, that is, conflicts of social forces, became obvious to historians from the very dawn of historiography. Thucydides, an ancient Greek historian, for instance, created a formula that said: Every city is divided into a city of the rich and a city of the poor which wage a permanent war against each other. Classical Chinese authors rapidly came to similar conclusions. The greatest thinkers of the Islamic world also accepted this view, particularly the great historians and sociologists al-Bīrūnī and ibn Khaldūn who advanced to the very threshold of historical materialism.

The experience of the great bourgeois revolutions of the sixteenth to the eighteenth centuries, the lessons that were drawn from them and periodically surfaced in ongoing political debates, provided the impetus that led early nineteenth-century French historiography to create the concepts of *social classes* and conflicts between social classes, that is, *class struggle*, as instruments for the understanding of history. The concepts were applied successively by François Quesnay, Benjamin Constant, Augustin Thierry, François Auguste Mignet, François Guizot, and Louis-Adolphe Thiers to their studies of the English Revolution, the conquest of England by the Normans, the French Revolution, and the restoration of the Bourbons in 1815.

Others had taken this path before them, notably British and German authors, among them Schiller, in his study of the sixteenth-century Dutch revolution. Certain great thinkers of the Enlightenment, particularly Voltaire and Montesquieu, had already established that history is determined in the last analysis by the material conditions in which it unfolds. But they tended to place the emphasis on the natural (climatic, geographical, racial, etc.) and political (constitutional) conditions, rather than the social and economic conditions. Jean-Jacques Rousseau and Antoine Condorcet went further in the latter direction.

The merit of sociological historiography lay in its systematic application of the new concepts of class, if not to the entire span of human history, at least to major periods of history lasting several centuries. In this respect, they accomplished a genuine revolution in the social sciences, combining the

advances of historiography with a better understanding of the structure and dynamics of different societies. Marx and Engels integrated this understanding and were therefore as much heirs of French sociological historiography as they were of German classical philosophy.

Nevertheless, while the work of the early nineteenth-century French historians undeniably represented a great advance for historical science and the science of society, it still displayed major gaps in relation to a scientific interpretation of history, as well as flagrant contradictions in its understanding of the social and political (and therefore historical) reality of their epoch, that of triumphant capitalism:

(a) The French historians handled the concepts of "social classes" and "conflicts between social classes" in an essentially descriptive way. While not denying the material basis of these conflicts, and sometimes even correctly exposing it, especially when dealing with certain class antagonisms (but not all) in feudal society, they failed to clearly establish the structural and organic link between the place of social classes in society, above all in production, and their material interests, social roles, and political struggles.

(b) They generally viewed ideological struggles—conflicts between systems of ideas, "spiritual values" (God, Religion, Freedom with a capital "F," the Common Good, Beauty, and even Nation)—as superimposed on, and separate from, the conflicts of material interests, as endowed with their own allegedly intrinsic meaning, or even as having eternal value.

(c) They generally did not treat, or treated only marginally, the interests and struggles of the poorest layers (classes) of society, of those who had never gained the upper hand in the past for any subtantial amount of time, who had been the eternal losers of revolutions and social and political struggles. When they did describe these elements, they most often did it without understanding, in the light of their own obvious class bias and sometimes even class hatred.

As a result, they perpetuated innumerable slanders passed on from one generation of chroniclers and historians to the next, despite the sometimes grotesque nature of the contention. These slanders included, selected at random: the legend that the Albigensians or Cathars refused to have sexual relations and, at the same time, practiced infanticide on a mass scale; the myth that the Slav peoples of the High Middle Ages were incapable of constituting states, a "quality" allegedly reserved to the Germanic peoples; the myth that the Jews were deprived of "martial abilities"; the legend that the Anabaptists had "socialized" women at

Münster; the legend that the Mexican Indians practiced human sacrifice on a vast scale; the myth of the "cruelty" of the Native Americans; and that of the "congenital laziness" of blacks, who allegedly would have refused to work had they not been subject to slavery.

Indeed, it is regrettable but undeniable that historiography—save for historiography influenced by Marxism—has generally produced history written by and for the victors, to the detriment of both historical truth and the honor of the vanquished.

(d) More precisely, these historians applied the same concepts of class and class struggle with steadily greater reticence as they began to account for the antagonism between capital and wage labor, as they drew closer to the nineteenth century, as they began dealing with contemporary social struggles, and therefore as historiography and sociology inevitably became intertwined with politics. From that moment on, under the obvious pressure of their own class interests, these great bourgeois historians and sociologists denied that in acting the way they acted in the political arena they were defending specific material interests, different from those of other social classes. They suddenly became transformed into defenders of some eternal "Social Order," the "Common Good," the "General Interest of the Nation," the "Supreme Spiritual Values," etc.

They no longer presented their class enemies as such, but as "breeders of disorder," "bloody Anarchists" (later, some would say "Bolsheviks holding a knife in their teeth and cutting children's fingers into the soup," and even as "those who incarnate the Evil Empire") or "violence-mongers"; in a word, those challenging bourgeois authority were viewed as "barbarians" opposed to "civilization." The racist and fascist ideologues and politicians would state it even more clearly: "sub-humans," beings deprived of human quality, thereby justifying the inhuman way in which they treated these adversaries.

(e) They failed to lay bare the origins of social classes and the state. By the same token, they presented social classes and the state as more or less eternal, except perhaps for the most primitive stages of human existence. They considered the disappearance of these institutions as impossible, and even "contrary to human nature."

In developing the theory of historical materialism, Marx and Engels superseded these gaps and contradictions of French sociological historiography. In doing so, they enriched and clarified the concepts of social class and class struggle:

(a) Social classes are not permanent and eternal institutions of human

society, let alone human existence. They arise at a given stage of the development of society. They develop and are transformed from one social formation to the next. They are destined to disappear. Social organization is passing and will pass through the successive stages of primitive classless society, various forms of class society, and the future classless (communist) society.

(b) To understand this general line of march of history—that is, the origin, development, and withering away of the division of society into classes—you must start from the *primacy of material survival* for humankind as well as for all living species. But, unlike all other species, the human species produces its means of survival (its daily subsistence and the reproduction of the species) itself, through deliberate collective action: *social labor.* This social labor creates a social product which basically includes the necessary product and the social surplus product.

The necessary product makes possible the maintenance (and therefore the reproduction) of the existing labor force and tools. The social surplus product includes all the commonly produced goods not indispensable to that maintenance. As long as the social surplus product remains insignificant, the division of society into classes is impossible, if we mean by that that a fraction of society is released from the necessity of producing its own subsistence (is supported by the social surplus product). But as long as the social surplus product is significant, even expanding, yet insufficient to free the great majority of society from the obligation to devote the bulk of its efforts to the production and reproduction of its material existence (the material existence of all society), the division of society into classes is inevitable. And as soon as the social surplus product becomes so large and valuable that the necessary product can be produced by a considerably smaller effort (a mere few hours of work a day), the material basis for the advent of a classless society exists.

(c) The size of the social product, and therefore also of the social surplus product, depends, in the last analysis, on the social productivity of labor. Economic progress is measurable by this average labor productivity as well as by the average life expectancy (average longevity) of human beings. The level of average labor productivity depends essentially on the *level of development of the productive forces,* that is, of the objective productive forces (tools, work implements, etc.) and of the human productive forces (number and skill of producers). The technique of production (technology) is therefore a combination between these two elements, and is co-determined by the level of the technical (and more or less scientific) and cultural knowledge accumulated.

By the same token, the release of a part of society from the necessity of devoting most of its time to the production of its subsistence in the broad sense of the term—and therefore the existence of ruling and propertied classes—is not just exploitative and predatory, although those are its prime features. It also corresponds to society's objective need to insure the accumulation, transmission, and availability of a store of knowledge, and, if possible, the expansion of that knowledge, enabling an increase in the productivity of labor. This social function may be called the *function of accumulation*.

At a certain point of social development (of the development of the productive forces), the function of accumulation formerly performed by small collectivities on a communal or tribal and voluntary basis is monopolized by a fraction of society which simultaneously takes over the means of production and a part of the social surplus product to be used for unproductive (and often wasteful) consumption. That is the social basis and social function of ruling classes. They live off the labor of others and monopolize the functions of management and accumulation.

(d) In the course of producing their material life and organizing social labor, human beings, and after a certain stage of evolution, social classes, establish particular relations to each other, which Marx and Engels called *relations of production*. Every form of society, every concrete social formation, is characterized by such specific relations of production. These relations of production determine all "economic relations," that is, not only the immediate production but also the circulation of goods and the way in which they are made available, the mode of appropriation of working implements by the producers (the units of production). The totality of these relations of production determine in the last analysis all social relations (in class society, all class relations) and, by the same token, the very structure of society. This is the *first central thesis of historical materialism*.

(e) Stable relations of production that reproduce more or less automatically constitute *distinct modes of production*. Marx and Engels recognized a series of modes of production: the primitive communism of hordes, clans, and tribes; the slave mode of production; the Asian mode of production (which contemporary Marxists more and more prefer to call "the tributary mode of production"); the feudal mode of production; the capitalist mode of production; and the communist mode of production (of which socialism will be the first phase).

Interspersed among these historically distinct modes of production, that do not necessarily follow each other in linear fashion or in the order

given, there generally appear transitional periods, characterized by less stable relations of production and a broader range of possible evolutions, Marx and Engels, for instance, called the transitional phase between feudalism and capitalism "petty commodity production," a form which, incidentally, had already appeared at the height of the slave mode of production.

A mode of production is a structure and cannot be fundamentally modified in gradual fashion. It can only be overthrown by revolution. Moreover, it should be noted that even when a new mode of production has stabilized, relations of production that represent a survival of the past can co-exist with relations of production characteristic of the new mode of production. But the assertion of the new mode of production precisely implies that its characteristic relations of production be hegemonic and that they engulf, and eventually assimilate, these survivals (i.e., the *law of uneven and combined development*).

(f) A *progressive mode of production*, that is, one that is superior from the standpoint of material civilization and culture to the mode of production which it replaces, must eventually give a major impulse to the development of productive forces; in other words, it must enable society to save labor, to reduce physical effort. (In class-divided society, this advance benefits mainly the ruling classes, who use it to extend their leisure activities, consumption, and culture. But the productive classes can fight to partake of this advance with some, albeit modest, success.) This is generally what happens during the phases of consolidation and rapid development of a given mode of production. But the very nature, the internal laws of development, and the intrinsic contradictions of each mode of production entail that a phase of decline will inevitably follow those phases. In the phases of decline, the existing relations of production become fetters on a new leap forward of the productive forces, either because the latter cease to grow altogether, or because their growth is achieved at the expense of an "erosion" and a more and more explosive destabilization of the existing relations of production, social structure, and "social order." At that point, a period of acute and ever more generalized social crisis opens, leading to social revolutions and counter-revolutions.

(g) There is no automatic link between the level of development reached by the productive forces on the one hand, and the survival or displacement of the existing relations of production and mode of production on the other, except in the most general sense, namely, that this level limits the range of possible forms of social organization (for example, the

modern factory and the world market were not possible with the techniques available in 100 B.C.; slavery cannot become general on the basis of today's industrial techniques; communism was impossible with the techniques of the fifteenth and sixteenth centuries, etc.). The two terms are mediated by the real class struggle and its overall outcome at any given moment.

Men and women make their own history. They do not make it free from any material constraints, with an unlimited range of possibilities. But they do make it. And the concrete historical process depends primarily on the outcome of their struggles ("the subjective factor of history"), even though the latter may be "overdetermined" by a series of historical and social factors beyond their control ("the objective factors of history"). This overdetermination, however, is never so strict as to leave open only one path of historical development. Marx and Engels stressed that, out of the periods of acute social revolution—the epochs of decline of a mode of production—there could arise either a superior mode of production (a superior organization of society from the standpoint of the life and survival of humankind, due to the victory of the revolutionary class) or the mutual decomposition of the contending social classes and a general decadence of society. This is what happened, for instance, with the decline of the slave mode of production in ancient Rome. It is also the historical basis of the dilemma that we face today: "socialism or barbarism."

(h) The class struggle is always an overall class struggle, encompassing most if not all spheres of social activity, whether or not the participants are conscious of it. Men and women cannot interact and establish relations of production without at the same time establishing relations of communication. Everything humans do or produce must "go through their heads" and is therefore accompanied by "ideological" representations (in the guise of ideas, systems of ideas, hopes, fears, and other feelings) which react in turn on the material actions of those who experience them. These systems of representation of the material world in the heads of human beings constitute a component of the ideological superstructure of all societies. In the last analysis, the social base (or infrastructure), the social relations of production, determine this social superstructure; that is, they determine the evolution and prevailing forms of the state, law, morals, religion, philosophy, science, art, and literature in each epoch. Social existence conditions social consciousness. That is the *second central thesis of historical materialism.* Because the ruling class controls the social surplus product and therefore all society, the ideology of the ruling class is

generally the dominant ideology of each epoch.

This does not mean, though, that it is the only existing ideology in a given epoch. Remains of the ideologies of old ruling classes can survive long after the end of their rule and exist alongside the current dominant ideology. Ideologies of intermediate classes (such as the petty bourgeoisie in capitalist society), as well as ideologies of newly rising classes, that are revolutionary in relation to the existing ruling classes can also co-exist with it. In general, an intense ideological class struggle precedes and opens a historical epoch of social revolution. But it is impossible for a social class to conquer ideological hegemony without controlling the social surplus product, that is, without having achieved economic hegemony. This is why the bourgeoisie, which had prospered extensively under the absolute monarchy, could become ideologically hegemonic before the victory of the bourgeois revolution, whereas the proletariat cannot conquer a comparable hegemony before the revolution that overthrows the bourgeois state and expropriates capital.

(i) The state is the product of the division of society into classes, an instrument for the consolidation, maintenance, and reproduction of the rule of a given class. That is the *third central thesis of historical materialism.* The state is not consubstantial with "organized society" or "civilization" in the broad sense of the world. It has not always existed. It will not always exist. The analysis of the origins, specific development, and possible withering away of the state is one of the main contributions of Marxism to social science.

State institutions are an essential component of the social superstructure; they include both coercive elements (the army, repressive bodies, and the judicial system) and intergrative elements used to persuade the productive classes to accept the class exploitation and oppression they suffer, to mask and "legitimate" the exploitative and oppressive nature of these institutions. This cooptative purpose is the basic function of the ruling ideologies mentioned above, and of the institutions which transmit them such as the educational system, the churches, the mass media, advertising in bourgeois society, etc. By the same token, any large-scale, let alone generalized, class struggle must necessarily be a political struggle—independent of the consciousness of the fighters—a struggle for the maintenance, or the weakening, or even the overthrow of a given state, of the political power of a given class.

(j) Between the overthrow of state power and economic domination of the bourgeoisie and the advent of a classless and stateless society stands a historical transition period characterized by the dictatorship of the

proletariat, that is, the exercise of state power by the wage-earning working class. Its functions are to prevent the old exploiters from reconquering power and to organize the economy and society with a view to the emancipation of humanity through a progressive and conscious reorganization of all spheres of social activity, beginning with material production, the distribution of goods and services, the management of the economy and state by the producers themselves, and the diffusion of culture (universal access to existing knowledge and information).

The Transformation of English Political Economy

Marx's and Engels's critical appropriation of French sociological historiography led them to link the concepts of social class and class struggle to the concepts of social labor and social product. This led them to deal with the problems of economic science and analysis, chief among which was the question of the nature of exchange. After some hesitation by Marx, they embraced the fundamental thesis of the classical English school of political economy: exchange is based on the equivalence (the comparison) of the quantities of labor contained in commodities.

This theory, known as the labor theory of value, had an ancient pedigree. It had already been crudely formulated in the Middle Ages by Scholastic and Islamic theoreticians (Thomas Aquinas, Albertus Magnus, ibn Khaldūn). It was refined in the seventeenth century by William Petty, and received its final form in the eighteenth century in the works of Adam Smith, and in the early nineteenth century in the works of David Ricardo.

As the theory of the rising and revolutionary bourgeoisie, classical political economy was distinguished by a frank and open attitude toward the problems to be resolved. Almost from the outset, it approached economic life under capitalism as an objective phenomenon requiring explanation, not a set of principles and "moral" values requiring approval or condemnation. It recognized that economic science, as all other sciences, ought to begin with immediate empirical data (chief among which were prices) and proceed to discover the laws that explained the movements of these data. This led it to place the *value of commodities* at the very center of its explanation. For Adam Smith and others, the historical origins of the market economy constituted at least one of the foundations of the validity of the labor theory of value.

The eighteenth-century French Physiocrats (Quesnay, Turgot) applied the idea that labor alone produced value in their own specific way: they

asserted that only agricultural labor was productive. Their inflection and restriction of the concept clearly reflected the predominance of agriculture over industry in pre-revolutionary France. Nevertheless, they opened the way to two important advances over the existing tenets of English political economy. First, they conceived the income of the ruling classes (landowners as well as merchants and industrialists) as deductions from the product of the labor of the only productive class (for the Physiocrats, this was the peasant class); and, second, they represented economic life as a whole as a flow of products and incomes governing both current production and future production, i.e., *reproduction*. Marx drew on these advances to perfect his own economic theory.

For Marx had to seek to resolve several fundamental contradictions and riddles of English political economy to which Adam Smith and David Ricardo had found no solution:

(a) Their very definition of value was incomplete, unsatisfactory, and obsolete. Classical English political economy held that labor was, at bottom, merely a measuring instrument, a *numéraire* making it possible to reduce to a single "factor" the various cost items of a commodity, or the income of various social classes. But Smith and Ricardo did not proceed to answer the question: what is the essence, the nature of this mysterious value measured by labor?

(b) This lack of precision on the nature of value led Adam Smith to an inextricable contradiction—a genuine circular argument—in his attempts to find a quantitative measurement of value. (Ricardo only partially overcame the contradiction.) Smith contended that labor determined the value of commodities. But "the value of labor" in turn was determined by its wage. The dead end was obvious as soon as one asked: but what determines the value of the wage, that is, of the subsistence commodities purchased by the worker with her or his wage?

(c) The capitalist economy was perceived as essentially static. The classical school aimed above all to explain "the state of equilibrium." It only considered disruptions of this equilibrium due to imperfect competition, that is, to the survival of monopolies of all sorts, or to monetary phenomena. It did not perceive, let alone explain, the fundamental dynamic of competition that creates a quasi-permanent disequilibrium between supply and demand (the former often exceeding the latter) and its outcome: periodic crises of overproduction. This was not merely a reflection of the fact that both Smith and Ricardo lived before the phenomenon of periodic crises had manifested itself in its full magnitude. It was due above all to their total failure to understand the way in which

capitalist competition is based *in the production process itself* on a constant transformation of techniques and costs of production, which implies rapid changes in the value of commodities.

(d) Even classical political economy's theory of wages—the theory of Malthus and Ricardo—was essentially static. Wages, it asserted, oscillate around the minimum amount physiologically required for the workers' survival. This theory of wages, incidentally, was less economic than demographic. It claimed that the fluctuations of birth rates and infant mortality regulated the supply of workers on the "labor market." Any increase of wages above this physiological minimum would cause the supply of workers to grow significantly enough to cause wages to be lowered; the theory therefore concluded that wages more or less automatically sank back to the physiological minimum. Later in the nineteenth century, the German Socialist Ferdinand Lassalle would revive this false theory of wages with his "iron law of wages" formula (*Ehernes Lohngesetz*). One could point out that this theory of wages, grounded in the situation of a pre-industrial or an under-industrialized capitalist society (with little industry or enormous permanent structural under-employment), was a rationalization of the interests of the young bourgeoisie and of its attempts to drive wages down to a very low level (absolute pauperization of the proletariat).

(e) The main representative of classical political economy, David Ricardo, defended a false theory of money: the so-called quantitative theory of money, which introduced a fundamental contradiction in his entire economic analysis (in fact, in his entire system of thought). On the one hand, Ricardo was a systematic and coherent defender of the labor theory of value and asserted that the value of all commodities was determined by the quantity of labor that they embodied. On the other hand, he contended that the value of gold was determined by the quantity of gold in circulation. Yet gold, too, was undeniably a commodity produced by human labor. Why then should its value not be determined by the quantity of labor that it embodied, but by the magnitude of its circulation?

(f) Classical political economy purported to be essentially objective. It accounted for what was—sometimes so brutally that it verged on cynicism, particularly when it identified productive labor with labor productive of profits. But when confronted with the reality of workers' struggles and workers' organization, particularly in favor of wage increases and shorter workdays, it suddenly ceased to be content with an account of what was an undeniable reality, and became normative, subjective, moralizing. It tended to condemn workers' organizations and struggles

as "fetters on freedom," "obstacles to free competition," "conspiracies," "utopias running contrary to the inexorable laws of economics (the laws of the market)," "offenses against public order," etc. To do so, it had to deny a fundamental aspect of economic and social reality, one which its most lucid exponents, the "Ricardian left" (the most radical disciples of David Ricardo), nevertheless laid bare; namely, the exploitative nature of the capitalist mode of production, which inevitably sharpened the class struggle between employers and wage earners, and inevitably led the latter to regroup and coalesce to defend their interests. If (bourgeois) freedom implied the right of each and every one to defend his or her "selfish" economic interests, why should wage earners not enjoy the same right? Why should it be legitimate for bosses to try to increase their profits, and illegitimate for wage earners to try to increase their wages?

Marx and Engels succeeded in overcoming all these inherent contradictions of classical political economy due to two fundamental scientific discoveries of Marx and their consequences: the elaboration of a coherent system of economic analysis incorporating a coherent, faultless explanation and critique of the capitalist mode of production and its laws of motion.

Marx established that labor was not first and foremost a unit providing a common standard for measuring the different production cost elements of commodities. *It was the very essence of value.* Value is labor, or, more precisely, a fraction of the labor potential (the total mass of workdays or work hours) available in a given society during a given period.

Social labor in general (that is, abstracted from the particular trade or skill of each particular worker) is the basis for the life and survival of all human societies. In a society based on private property, this total social labor is fragmented and broken up into private labors performed by individuals and units of production independently of each other. These tasks are not distributed to the producers on a conscious basis, but spontaneously. The producers' spontaneous performance is only subsequently corrected by the market. Individuals have to get the labor which they have actually already performed, recognized as social labor. Private labor is always a parcel of social labor, but every quantity of private labor is not automatically recognized as such. It is precisely the value of commodities that governs this recognition. *The value of commodities is the quantity of socially necessary abstract labor needed to produce them* (the formula "socially necessary" is based on the average productivity of labor in each particular branch of production).

From this first great discovery by Marx emerged a second. Wage earners, proletarians, male or female, do not sell "labor" but *labor power*, that is, their ability to produce. It is this labor power which bourgeois society transforms into a commodity. It therefore has its own value, as objectively given as that of any other commodity: its own costs of production, its own costs of reproduction. As every other commodity, it has a usefulness (use value) to its purchaser, a usefulness which is the precondition for its sale but which does not determine the price (value) of the commodity sold.

But the usefulness, the use value, of labor power to its purchaser, the capitalist, is precisely that it can *produce* value, since by definition all employed labor power in a market society adds value to the value of the machines and raw materials to which it is applied. Every wage earner therefore produces "added value." Since the capitalist pays wages to the worker that represent the cost of reproduction of her or his labor power, he will only purchase this labor power if the "value added" by the worker *exceeds* the value of the labor power itself. Marx called this fraction of the value newly produced by the wage earner *surplus value*. Surplus value is the difference between the value newly produced by a labor power and this labor power's own value, that is, the difference between the value newly produced by a worker and the costs of reproduction of the worker's labor power.

Surplus value—the total sum of the incomes of the owning classes (profits + interests + land rent)—is therefore what remains (a deduction) of the social product after the reproduction of the work force is assured and its maintenance costs are covered. It is therefore nothing else than the monetary form of the social surplus product, which is the ruling classes' share in the distribution of the social product in all class societies: slavemasters' income in a slave society; feudal land rent in a feudal society; tribute in the tributary mode of production, etc.

The discovery of surplus value as a fundamental category of bourgeois society and its mode of production, along with the explanation of its nature (a result of the surplus labor, of the unpaid, unremunerated labor supplied by the wage earner) and of its origins (the economic compulsion forcing the proletarian to sell her or his labor power to the capitalist as a commodity) represents Marx's main contribution to economics and social science in general. But it is itself an application of the perfected labor theory of value to the specific case of a particular commodity, labor power.

However, a rigorous application of the labor theory of value to the case of the commodity "labor power" also required a deeper analysis of the particularities of this commodity. Labor power, the ability to work, is not a purely physical quality that can be measured entirely in energy terms (e.g., the consumption of calories and the production of ergs which those calories permit). Workers are not only endowed with muscles, but also with nerves and a brain. While the reproduction of their purely physical ability to work is always indispensable for them to perform the labor expected by their boss, it is, in most cases, not sufficient.

The domestic labor of women in the family contributes to the reproduction of the work force from generation to generation, from meal to meal, from illness to illness, etc. But since it does not produce commodities, it does not enter into the determination of the total quantity of labor spent on commercial production in a market economy. Marx merely noted, studied, and explained this form of accounting without, of course, either approving it or identifying with it.

Moreover, the full utilization of labor power depends on the worker's diligence and attention, qualities which are by no means purely physiological. The worker must be ready and willing to work at a certain pace, with a certain attention and assiduity, with a minimum amount of skill (except perhaps for the lowest paid laborers, and only sometimes at that). Meeting all these requirements entails "costs of reproduction" that enter into the determination of the wage. This is obvious with respect to the costs of acquiring skills (apprenticeships, etc.), but it also applies to learning to be attentive, getting used to assiduity, caring for tools, and so on.

The capitalists, of course, try to obtain these qualities at the lowest possible cost, through threatening workers with the loss of their jobs or through discipline enforced by supervisory staff (foremen, headmen, time-motion experts). But experience has shown that these extra qualities of labor power beyond the mere physiological ability to produce energy can only be produced and reproduced normally through the consumption of certain goods and services.

The value of labor power therefore includes two components corresponding to the value of two sets of commodities: those that are intended to satisfy the most elementary physical needs of the worker, that is, the physiological minimum required to guarantee survival in the strictest sense of the word; and those that are intended to satisfy what Marx calls "moral-historical" needs, items that have been incorporated into the average wage through historical evolution, because of workers' struggles,

and which vary from one country to another and from one epoch to the next.

Far from permanently and automatically falling to the physiological minimum, wages therefore fluctuate, according to Marx, in tune both with the economic situation and with the long-range tendency of this moral-historical component of wages to expand or contract. The bottom line of these fluctuations is the absolute physiological minimum beyond which the worker's physical ability to work begins to deteriorate (she or he loses weight, faints on the job, falls ill, etc.). Their ceiling is the level above which profits disappear.

Marx's theory of wages states that wages fluctuate, on the one hand, according to the size of the industrial reserve army (the extent of unemployment and the mass of potential but not virtual wages earners, such as housewives who are ready to sell their labor power, the surplus population of the countryside, etc.), and, on the other hand, according to the periodic impact of the outcome of struggles between capital and wage labor on the balance of forces between these classes. The fluctuations of the industrial reserve army are determined in the last analysis by the ups and downs of capital accumulation.

It will be readily seen that this theory represented an enormous improvement over Malthus's and Ricardo's theory of wages, since it no longer linked the evolution of wages to the population curve alone (by dealing only with the labor supply curve), but to the overall economic dynamics of capitalism (by dealing with the evolution of both the labor supply and the demand for labor).

But Marx and Engels also entered the periodic shifts in the relationship of forces between capital and labor into this wage determination equation, thereby breaking out of the narrow and mechanical economic determinism of classical political economy. The class struggle became a determining factor (a variable) partly autonomous from the evolution of current capitalist production. They revealed that a genuine dialectic linked the economic motive forces of this mode of production to the class struggle. Economic analysis thereby made it possible both to explain and to justify the workers' struggle from an objective, scientific standpoint. *Science became a weapon in the proletarian struggle.*

The way in which Marx resolved the contradictions of Ricardo's theory of money also constituted a major advance of economics. For Marx, only a commodity having a value of its own (an intrinsic value) could be the "pivot" of the monetary system. That commodity was

gold. Since gold had a value of its own (the number of hours of labor socially necessary to produce one ounce of gold), prices evolved on the long term in accordance with the ratio between the trend of labor productivity in manufacturing and agriculture on the one hand, and the trend of labor productivity in gold mines on the other. The quantitative theory of money has no validity whatsoever for metallic money.

When there is an excess of gold in relation to the needs of circulation and payments due in a given country, gold *does not lose* its value. Rather, it is partially withdrawn from circulation, thesaurized. In the Marxist theory of money, the fluctuations of gold stocks (the amount of money thesaurized) play the role of regulators that (re)establish the equilibrium between the mass of money in circulation and the value of the commodities with which it must be exchanged, taking into account payments still pending and the velocity of circulation of this money. Conversely, in strict application of the labor theory of value, paper money *does lose* value—that is, a unit of paper money does represent a smaller quantity of gold—if it is issued in excess (paper money inflation).

Starting from these two scientific discoveries in the field of economics, Marx was able to unravel *the main laws of motion of the capitalist mode of production.* The 125 years of economic and social history that have passed since he wrote Volume One of *Capital* have resoundingly confirmed the validity of his finding:

(a) The tendency to constantly revolutionize production techniques and the organization of labor through a form of technical progress whose fundamental thrust is labor-saving, i.e., substituting machines for living labor.

(b) The tendency for firms to subordinate all investment decisions to the search for additional profits. Capital thirsts for surplus value because surplus value is the only ultimate source of profits and therefore of additional capital. The drive to maximize profits is an inevitable consequence of competition and private property.

(c) No less inevitably, the accumulation of capital (the expansion of the mass of capital) is at once the goal and the consequence of all capitalist economic mechanisms.

(d) The accumulation of capital takes the form of a progressive concentration and centralization of the various existing capitals. Capitals increase in magnitude. But at the same time, an increasing number of small- and medium-sized capitalists are absorbed by increasingly fewer giant corporations.

(e) As capitals grow, the portion of their mass allocated to the

purchase of labor power (variable capital) expands more slowly than the portion allocated to the purchase of machines, raw materials and auxiliaries, energy, etc. (constant capital). The organic composition of capital (the ratio of constant capital to variable capital) tends to increase in the long run.

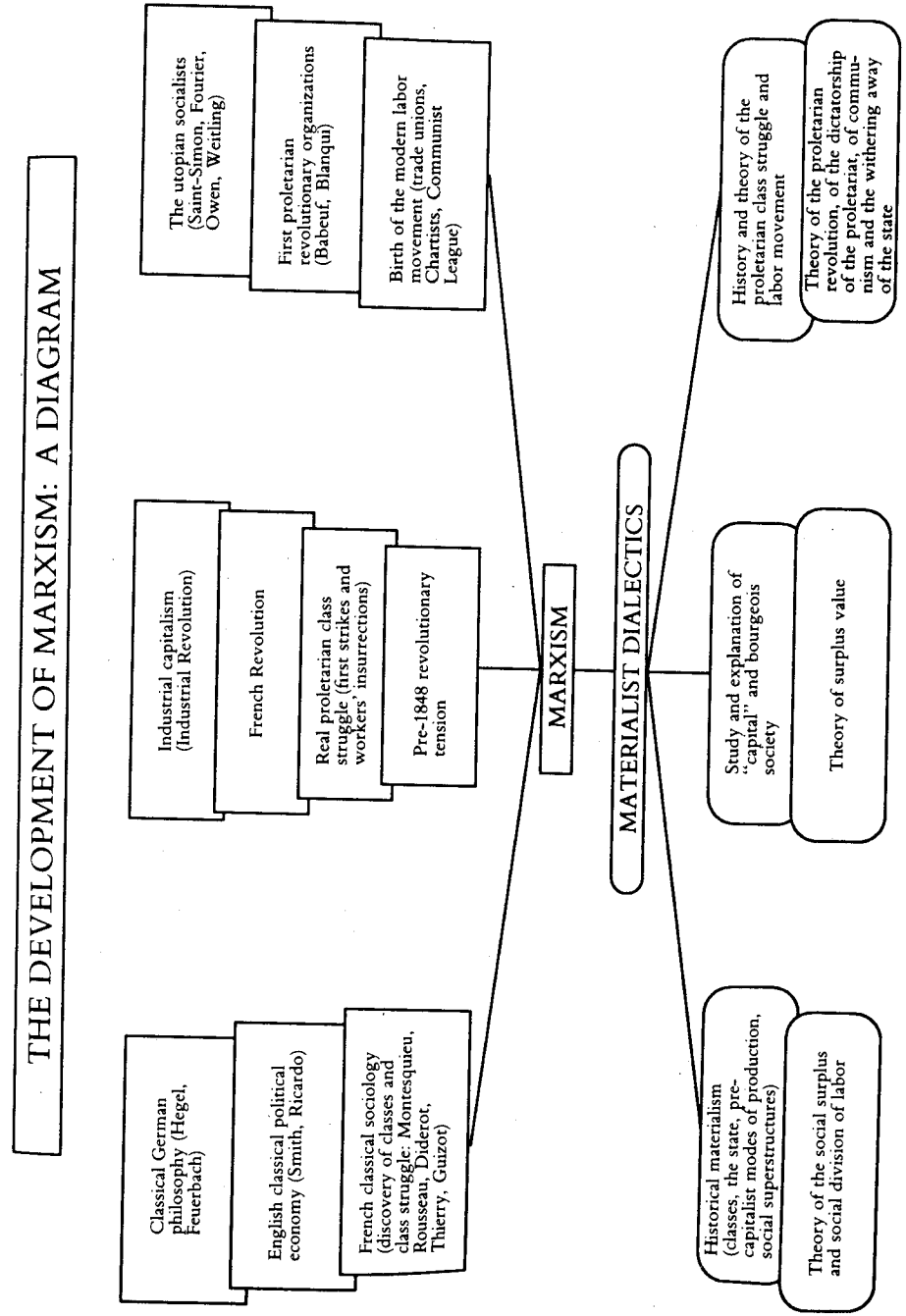
(f) The ratio of the fraction of total surplus value received by each branch of capitalist activity to the capital invested in that branch tends to even out in the different branches: this is the tendency to the equalization of the rate of profit, to the formation of an average rate of profit at least in each country for a given period.

(g) This average rate of profit tends to fall as the organic composition of capital increases. The downward tendency, though, is compensated by several contrary factors, chief among which are increases in the rate of exploitation of the labor force, increases in the rate of surplus value (the ratio between surplus labor and necessary labor in the current production process). But, in the long run, the falling tendency prevails.

(h) The decline of the average rate of profit results inevitably in periodic crises of overproduction of commodities and overaccumulation of capitals. These have occurred twenty-one times since 1825, that is, since the first crisis on the world market for industrial goods. So far, the duration of the "industrial cycle" (the succession of phases of crisis, stagnation, economic recovery, prosperity, overheating, and crisis) has varied between six and nine years, that is, around an average of seven and a half years.

(i) As economic crises are inevitable under the capitalist regime, so are social crises. These are periodic large-scale struggles between capital and labor caused by the tendency of capital to increase profits at the expense of wages, thereby provoking crises and unemployment, and the no less inevitable fight back of the wage-earners trying to defend and increase their wages and reduce their average work week.

(j) Periodic political crises, that is, objectively revolutionary mobilizations of the proletariat combined with counter-revolutionary efforts by the bourgeoisie, break out recurrently after phases of relative political stability of capitalism. In creating the proletariat, capitalism produces its own gravediggers. It cannot grow substantially and durably without the proletariat also growing substantially and durably, and without the proletarian class struggle developing apace. Moreover, the proletariat tends to constitute a larger and larger majority of the active population, at least in industrialized and semi-industrialized countries.



4

The Supersession of Utopian Socialism

One of the most notorious commonplaces used against socialism is the claim that "it goes against human nature." Private property, it alleges, is "innate" in the human species. Rich and poor have always existed and will always exist.

Anthropology, archeology, prehistory, and ethnology, however, all teach us that this claim is groundless. Human beings lived for several million years without private ownership of the means of production, without a market economy, and without a class-divided society. Homo sapiens, their most physically advanced type, did so too for tens of thousands of years. In fact, private property and class-divided society have probably existed for less than ten thousand years, during most of which they existed only among a tiny fraction of the human species; in other words, these elements have been present for only a minute span of human life on Earth.

The apologetic thesis of social inequality based on "human nature" is also disproved by a phenomenon that emerged after the division of society into classes; namely, the fact that *social inequality has been constantly challenged within class society itself.*

These recurrent challenges can be interpreted in a variety of ways. They can be seen as the expression of the objective interests of the exploited, even though the latter—and their spokespeople—did not always understand their own revolts in that light. They can be seen as the manifestation of one of the innermost drives of our anthropological nature: the instinctive tendency to inter-human cooperation without which social labor and the survival of our species would be impossible. One can explain that the thirst for justice and, therefore, the rejection of social injustice are equivalent to this social need for cooperation at the level of individual psychology, and make their way toward consciousness,

at least in certain individuals, according to the vagaries of their individual histories (particularly what happened to them in childhood). One can also propose a balanced combination of all these factors.

Whatever interpretation is chosen, the fact remains that class-divided society has been challenged repeatedly for at least five thousand years, not merely by ideological critics, literature, and the vision and projection of a classless socialist society, but also and most importantly, in practice, by periodic revolts of the oppressed and exploited. These range from the first strikes and peasant revolts of pharaonic Egypt, to the slave revolts of ancient Greece and Rome, the most famous of which remains that led by Spartacus in the first century B.C. These were followed by the powerful slave movements that contributed to the fall of the Roman Empire, those of the Bagaudae in western Europe and of the Donatists in North Africa.

The history of India and especially of classical China is dotted with innumerable peasant revolts, several of which were victorious and gave birth to new imperial dynasties. During the Tokugawa period in Japan, between 1603 and 1863, there were over 1,100 peasant rebellions. Tsarist Russia also experienced many peasant uprisings, including the most famous, that of Pugachov in the Ukraine in the seventeenth century.

In the Spanish and Portuguese colonies of the Americas, the Indians driven into serfdom and the slaves organized repeated insurrections. The most famous is that of the Peruvian Indians led by Tupac Amarú in the mid-eighteenth century. There was the victorious revolt of the black slaves of Haiti, the Black Jacobins, at the end of the eighteenth century. And in the nineteenth century, there were numerous revolts of black slaves in North America, notably that led by Nat Turner in 1831, and in Brazil.

In western and central Europe, an almost uninterrupted chain of peasant rebellions (including the French jacqueries and the English Peasants' Revolt of 1381 led by John Ball) and uprisings of craftsmen and journeymen against the reign of the nobility and rich merchants extended from the thirteenth to the sixteenth centuries. It led right up to the great bourgeois revolutions, those of the Netherlands, England, the United States, and France, with which it intermingled, introducing into them deep contradictions, including an embryonic dynamic of permanent revolution.

All the religious and ideological challenges to class society, including utopian socialism, correspond in the last analysis to these real movements of revolt of the oppressed, whether free peasants subjected to state corvées (the payment of tribute), slaves, serfs, craftsmen, and journeymen or the first wage-earning and semi-wage-earning ancestors of the modern proletariat.

Many of the voices who rose from this long chain of revolts to speak out against social inequality with greater or lesser passion harked back to the memory of a more egalitarian society. The myth or legend of a "Golden Age," a "fraternally united society," which was believed to have preceded the division of society into groups fighting each other, inspired the ancient Greek poet Hesiod in the seventh century B.C. The same theme recurs in the mythology of many peoples.

Defiance of the existing social order was often expressed in religious garb. The first fathers of the Christian church were fervent "distributionists," enemies of private property, and advocates of a commonwealth. The famous formula "Property Is Theft," often attributed to Proudhon, who borrowed it from Brissot, a member of the French Revolution's Convention, originated in fact with the bishop of Byzantium, John Chrysostom ("John of the Golden Mouth"), who lived in the third century of our era. These fathers of the church were the direct heirs of radical Jewish sects like the Essenes, who thrived in Palestine after the Roman conquest, and were themselves in the continuity of the most radical Hebrew prophets.

Later on, violent denunciations of social inequality emerged in the dissident sects of all the great religions. Particular mention should be made to the Donatists in North Africa and the Mazdakeans in Iran.

During the Religious Wars of the fifteenth and sixteenth centuries, the condemnation of social inequality was particularly vigorous among the Hussites of Bohemia and the Anabaptists of Germany. During the English Revolution of 1640–1688, many voices, notably those of the Levellers and the Diggers, rose to denounce the continued exploitation of the poor despite the extension of political rights.

It would be inaccurate to present this socialist tradition in the most general sense of the term, stretching over millenia, as the product of some "poor people's subculture" which allegedly can be found in each class society side by side with the rich people's culture.

In the first place, most of the authors cited were not really poor people—who tended to be illiterate in those societies—but originated, rather, in fractions of the propertied classes or intermediate groups of intellectuals (scribes, priests, philosophers, scientists). A more accurate formula would describe them as *ideologies* of the successive exploited classes developing throughout history parallel and in opposition to the

ideology of the propertied classes, limited to a small minority of society.

But these cries of protest and revolt gradually gave way to more systematic proposals and models for the reorganization of society based on collective property. *The Republic*, written by the Greek philosopher Plato, can be considered the ancestor of all these models. Nevertheless, the actual prototype of these "utopias" is the work of Thomas More, the chancellor of England executed by King Henry VIII in 1535 and later sanctified by the Catholic church. Precisely entitled *Utopia*, it describes a country of that name in which a communal society has grown up.

Inspired to one extent or another by that first utopia, other social thinkers subsequently wrote variants on the theme. Among the more prominent in the seventeenth and eighteenth centuries were Tommaso Campanella's *Civitas Soli* (The State of the Sun) in Italy; James Harrington's *The Commonwealth of Oceana* in Britain; and François Fénelon's *La Télémachie* (The Adventures of Télémaque), Jean Meslier's *Le Testament* (The Testament), Morelly's *La Basiliade* (The Adventures of Basil) and *Le Code de la Nature* (Nature's Code) in France. The latter two were probably the most significant, specifically because in his *Code de la Nature* (1754), Morelly described a stateless society in which economic conditions explicitly determined political conditions. The Frenchman Gabriel Mably, writing in the same vein, directly inspired the nineteenth-century utopian socialist Charles Fourier.

From More to Mably though, all these authors confined their approach to describing a better society on a purely literary level. Only after Morelly and Mably, did utopian socialists, properly speaking, appear and move beyond that level. They combined literary descriptions of a new society with a *practical struggle for its realization*. The most important figures of this new generation were:

- The French count Claude Henri de Saint-Simon (1760–1825), who was rather an ideologue of the new industrial bourgeoisie than of the nascent working class. He directed his fire mainly against the misdeeds of the monarchy, nobility, clergy, bankers, and rich entrepreneurs. By contrast, he sang the praises of what he called the "workers," a category in which he included both the workers properly speaking and the industrialists directly involved in running their factories. His solution was for all these workers to be provided with cheap credit; for this, he advocated that they seize power. Industry and labor: those were the bases of all progress for Saint-Simon. His disciples were to play an important role among bourgeois liberal politicians of several countries during the 1830 to 1860 period.
- The Welsh industrialist Robert Owen (1771–1858), who was motivated by a deep feeling of revulsion against the poverty of workers in Britain. His search for a cure led him to advocate successively: social legislation, the foundation of communist colonies in America, the centralization of British trade unions into a single national confederation (the Grand National Union, 1834), and finally the creation of workers' production cooperatives, the first of which was established in Rochester in 1839. Owen is remembered in history mainly as the father of the cooperative movement.

- The French commercial agent Charles Fourier (1772–1837) and his disciple, Victor Considérant, who leveled some of the most radical criticisms of bourgeois society and its main pillars: private property, the social division of labor between agriculture and manufacturing (and city and countryside), commodity production, money as a universal source of venality and corruption, and women's oppression in the patriarchal family. They believed that the solution to the social question lay in the creation of phalansteries, self-managed communities of 1,000 to 2,000 producers-consumers working at once as farmers, craftspeople, and artists. While the other pioneer socialists founded their systems exclusively on reason, Fourier, anticipating Freud, the psychology of the unconscious, and modern radical feminism, placed great emphasis on the satisfaction and sublimation of instinctive drives through the consolidation of a socialist society.
- The French lawyer Étienne Cabet (1788–1856), who has the distinction of being the first to use the term "communist" to describe his doctrine and future society. Of all the authors mentioned here, Cabet had the greatest influence on working-class circles during his lifetime. His *Voyage en Icarie* (Travels in Icaria) was read by thousands of workers (his own estimate was that he had converted 200,000 followers, obviously an exaggeration). He had a deep impact on working-class consciousness in France on the eve of the revolution of 1848. His description of a state-planned economy—which he counterposed to the market economy—exerted a direct influence on French and German social democrats like Louis Blanc and Ferdinand Lassalle. Some even believe that it served as the model for Stalinist bureaucratic planning as it operated in the USSR and other societies patterned after the USSR.
- Finally, the French Socialist Flora Tristan (1803–1844), who advocated that workers organize themselves and rely on their own strength to struggle for their emancipation in her *L'Union Ouvrière* (The Workers' Union). She also proposed the creation of "workers' palaces." Every city, she urged, should have such palaces where absolute equality would reign and both sexes would receive a common education. Flora Tristan developed a radical critique of the condition of women at the time, describing them as "the proletarians of the proletarians themselves." Her ideas were to inspire the attempts to organize labor made during the revolution of 1848. Marx defended her against neo-Hegelian critics.

It is clear from this brief overview that these authors—as well as the concept of utopian socialism in general—do not deserve the reproach of having their heads in the clouds, being detached from the social and economic reality of their time, and lacking any practical concerns. Quite the contrary, they were lucid critics of bourgeois society who grasped the main features of its long-term evolution and contradictions, and were farsighted anticipators of the transformations that would be required to establish a classless society. Marx and Engels owed them a great deal. They learned very much from them. They took over and developed many of their ideas.

Nevertheless, utopian socialism was flawed by severe contradictions. The main weaknesses of utopian socialism that the founders of scientific socialism had to overcome were the following:

(a) The project of a socialist society was simply counterposed to existing bourgeois society, without reference to the advances and contradictions of the latter. For Marx and Engels, to the contrary, the advent of classless society would result from economic sources (the development of the productive forces, the socialization of labor) and social and political sources (the maturation and organization of the proletariat, the unfolding of the struggle between capital and labor), which flowed precisely from these advances and contradictions.

(b) For the utopian socialists, the essential driving force of the advent of the new society was education and propaganda, that is, overwhelmingly individual and superstructural phenomena. Inasmuch as they hoped that individual commitment would result in larger numerical results, they conceived of this process as "propaganda of the deed," a notion later picked up by anarchist and terrorist revolutionary groups. Hence the importance that utopian socialists gave to the immediate creation of "cells of the future society," cooperatives, communist colonies, and so forth.

For Marx and Engels, to the contrary, bourgeois society could only be abolished in its entirety, not factory by factory, village by village, or farm by farm. Its abolition therefore required the active participation of the majority of the population. Although Marx and Engels never challenged the demonstrative value of communist experiments—which confirmed that a society without bosses, without commodity production, and without money was possible—they contended that they were doomed to failure (to being reabsorbed by bourgeois society) as long as they remained isolated.

(c) The utopian socialists exaggerated the role of reason (and in the case of Fourier of reason and passions) in determining the action of broad masses. They did not sufficiently understand that what can be decisive for individuals taken in isolation is quite likely to be neutralized when a large number of individuals act together, if only as a result of the laws of probability (of large number). Divergent passions and divergent arguments cancel each other out as factors determining such actions. That is why Marx and Engels based their approach, instead, on the *common interests* of individuals belonging to a social class called upon to become the majority in bourgeois society: the proletariat. This was the force that would open the road to the advent of socialist society. But their approach negated neither the importance of propaganda and education, nor that of reason, nor that of a series of emotional feelings in the fight for socialism, insofar as all these motivations facilitate to one degree or another the gradual awakening of the proletariat to its class interests, the achievement of class consciousness.

(d) The main weakness of the utopian socialists flowed from all the previous weaknesses and explains why they were doomed to failure. This was the fact that classless society appeared in their doctrine as granted to consenting masses or even imposed upon recalcitrant masses by essentially authoritarian, and sometimes even tyrannical or despotic, regimes. From Plato's *Republic* to More's *Utopia* and Cabet's *Icaria*, the philosophers, sages, scientists, or educators ruled society as masters, sometimes even as explicit dictators. Repression, punishment, even prisons, armies and wars subsist in their utopias. Only Fourier's phalansteries, Owen's cooperatives, and Tristan's vision constitute honorable—at least partial—exceptions to this rule.

Marx and Engels, to the contrary, conceived the advent of classless society as the result of the real movement of self-organization and self-emancipation of the great masses. "The emancipation of the working class must be realized by the workers themselves; proletarians of all countries unite!" This concept, in a nutshell, was what was newest and most revolutionary in Marxism's contribution to human thought and history; it represented the most radical break with all other doctrines.

To understand utopian socialism, its roots, its advances, and its flaws, one must explain its class nature. Utopian socialism essentially represented the ideological expression of a revolt against class society, against social inequality, by pre-proletarian social classes who did not yet have the sufficient material economic force and social cohesion to insure the lasting victory of a regime without private property.

Again, class-divided society was not challenged only at the level of ideological criticism. It was mainly challenged in practice, as we have seen, by the periodic revolts of the exploited and oppressed. These were not scattered movements of small groups of desperados. They were powerful mass movements mobilizing thousands, even millions, of people that were sometimes victorious against all odds. But the fate of these victories is most revealing. Despite the courage, dedication, idealism, and extraordinarily bold social vision that distinguished many of these movements, they failed in the sense that they were not able to establish durably a classless society. They either lost power to their enemies after holding onto it for several years (as the Hussites at Tabor, the Anabaptists at Münster, etc.) or, keeping their grip on power, they eventually ended up reestablishing a class regime fundamentally similar to that which they had set out to overthrow (e.g., the Han and Tang dynasties of peasant origin in China).

A particularly striking case is that of the Don and Crimean Cossacks. Originally, they were runaway serfs who reconquered their freedom and reconstituted an independent, egalitarian tribal society that fiercely resisted every attempt of the tsars to bring them into subjection. Nevertheless, they ended up becoming the main instrument used by tsarism to subordinate and oppress the tribal societies of the Caucasus and Siberia and to suppress revolts in Russia itself.

The historical failure of all these revolts against social inequality was explained by Marx and Engels on the basis of the materialist interpretation of history. In the concrete conditions in which these revolts took place, the insufficient development of the productive forces only opened the following two alternative paths: either a "communism of poverty" which would be brought to an end by the new economic advance; or the replacement of one privileged owning class by another. Only the expansion of the productive forces achieved by capitalism provided for the first time in history the material possibility to establish durably a classless society based not on poverty but abundance (saturation of the basic needs).

The flaws and contradictions of utopian socialism therefore reflect in the last analysis the immaturity of the material (economic and social) conditions in which the pre-proletarian oppressed classes fought their battle for a classless society. Ultimately, the label "utopian" ought to be applied not to the goal these socialists sought to achieve, but to the conditions under which they tried to achieve it.

Does this mean that historical materialism disapproves these revolts of the exploited, these movements of the lower classes of the past, or that it considers them, at best, useless, because utopian, that is, unable to establish a lasting classless society?

Such a mechanistic version of vulgar "Marxism" does not correspond, even remotely, to the opinion of Marx and Engels—a fact recognized by the many critics of Marxism who claim that it created a contradiction between Marx and Engels "the scientists" and Marx and Engels "the moralists with a passion for revolution." In reality, there is no contradiction between the unconditional and undeniable support which Marx and Engels gave to Spartacus, the jacqueries, Thomas Münzer, Babeuf, and the Taiping and Sepoy rebellions, and their recognition of the impossibility of a lasting victory of these revolutionary leaders and movements.

In the first place, only a severe case of intellectual shortsightedness would hold that seizure of power alone influences history durably. Even defeated revolutions have been able to change the course of history and impose the implementation of their goals on the victors, when these goals corresponded to historical necessities (particularly economic ones) and to the interest of the majority of society, and when the vanquished fought energetically and obstinately for these goals. The abolition of antique slavery, despite the defeat of slave revolts, and the achievement of German unification, despite the defeat of the 1848 revolution, are two striking examples of this fact.

Moreover, massive revolts and popular revolutions give to revolutionary ideas—and therefore to the project of an egalitarian classless society—an infinitely greater resonance and striking force than mere oral and written propaganda. Even when they failed, past popular revolutions enriched humanity's socialist heritage to a degree that the efforts of philosophers and philanthropists alone could never have achieved. Without these revolts and revolutions, the development of utopian socialism, the development of scientific socialism, and the development of proletarian class consciousness would have been considerably delayed.

Finally, the task facing the modern proletariat is the most difficult task that any social class in history ever had to perform: building a new society without ever having exercised either economic, political, or cultural and ideological power before. The achievement of this goal would be even more difficult if the proletariat's emancipation struggle was not perceived as the legitimate heir and executor of toiling humanity's multi-millenial emancipation struggle, a struggle that left behind not only vanquished fighters but many real social advances.

In the last analysis, what underpinned Marx's and Engels's understanding of past revolutions and utopian socialism was a conception of historical progress that was not linear, purely economistic, and mechanistic but, rather, complex and dialectical. This interpretation implies a moral commitment.

The fact is that the exploited and the oppressed have rebelled, are rebelling, and will rebel against their unbearable conditions, whatever the ideologues might think and the "educators" might predict about their chances of success. The duty of every socialist, of every man and woman who loves humanity, is to fight with them and try to increase to the utmost their lucidity and chances of success. There is nothing romantic about this commitment. The only alternative would be to tolerate exploitation and oppression as a lesser evil than the emancipation efforts of their victims.

5

The Proletarian Transformation of Revolutionary Activity and Organization

The subsequent evolution of utopian socialism was influenced by three key figures who pioneered the transition from pre-proletarian philanthropy and propagandism to proletarian action properly speaking: the German Wilhelm Weitling and the French Pierre-Joseph Proudhon and Auguste Blanqui. Proudhon stood in the direct lineage of utopian socialism; Weitling had some continuity with it, but was closer to the revolutionary tradition that grew out of the French and American revolutions. Of the three, Blanqui was the most closely identified with the revolutionary tradition.

The two great eighteenth-century revolutions had produced a petty-bourgeois (Jacobin) and pre-proletarian far left embodied mainly by Samuel Adams and Thomas Paine in America, and by Gracchus Babeuf in France. This current had conceived a type of revolutionary organization that would help to prolong political activism beyond the consolidation of the main revolutionary conquests.

The agitation of Tom Paine and his followers subsequently led to the creation of the London Corresponding Society (LCS), led by Thomas Hardy, and many similar associations in the rest of the British Isles, chief among which was the United Irishmen led by Wolfe Tone in Ireland. Whereas the LCS was strictly legal, the United Irishmen and other groups outside London organized as secret leagues. Nevertheless, they all shared a common framework in that their main demands were political-democratic (the conquest of universal suffrage for the LCS; universal suffrage and national emancipation for the United Irishmen).

Their economic demands, although favorable to the toiling classes, did not go beyond a reform of bourgeois society.

By contrast, the main point for Gracchus Babeuf—the head of the Conspiracy of the Equals (*Conspiration des Egaux*)—and for his comrades was clearly the revolutionary conquest of power, not merely the conquest of democratic freedoms. Moreover, they set for themselves certain collectivist goals that tended to satisfy the economic and social demands of the poorest and most exploited layers of the population, above all the pre-proletariat (semi-proletariat) and the nascent proletariat. Nevertheless, these revolutionary organizations emerged independently from the self-organization of the wage earners properly speaking.

In 1797, the Babouvists attempted to seize power by a coup d'état while the Thermidorian counter-revolution was in full swing. They were crushed by repression. Babeuf himself was executed. One of the survivors of the Conspiracy of the Equals, Philippe Buonarotti, strove to preserve the continuity of Babeuf's revolutionary principles and projects in the Society of the Seasons (*Société des Saisons*). This league appeared in Paris around the time of the fall of the Bourbons, in the early 1830s; Auguste Blanqui became its unchallenged leader.

Blanqui was the greatest French revolutionary of the nineteenth century. Possessing unshakable firmness, courage, honesty, and conviction, he embodied the aspirations and actions of the French, particularly the Parisian, proletariat. He tried repeatedly to seize power by a series of coups d'état, was arrested many times—he spent over twenty years in jail—but succeeded in maintaining the continuity of his clandestine organization. When the Paris Commune arose in March of 1871, he was in jail in the territory controlled by the counter-revolutionary government of Thiers. Everyone, including Karl Marx, considered him the natural leader of the Commune, in which his followers formed a minority around Vaillant.

The Paris-based revolutionary government proposed to Thiers that Blanqui be freed in exchange for the release of all the Commune's hostages, including the archbishop of Paris. But Thiers refused, demonstrating the extent to which the French bourgeoisie feared the organizational and leadership capacities of the great revolutionary, and the impact his political gifts could have had on the outcome of the civil war. The Blanquist current eventually fused with the Marxist current during the 1880s and 1890s, as part of the process of creating a mass Socialist Workers Party in France.

Contrary to Blanqui, the German Wilhelm Weitling was a self-taught

worker who arrived at communist and revolutionary conclusions not only on the basis of study, but also on the basis of his own flesh-and-blood experience of the proletarian condition. At that time, certain German journeymen-craftsmen used to travel throughout Europe, a way of life that enabled them to supersede the localist and corporatist outlook of the first proletarian layers of their country. In 1834, some of them founded a League of the Outcast (*Bund der Geächteten*) in Paris (under the influence of the Blanquist Society of the Seasons), a secret society from which the League of the Just (*Bund der Gerechten*), led by Weitling, emerged in 1838. The latter adopted a utopian communist program entitled "Humanity as It Is and as It Ought to Be."

This secret society abandoned its vague projects of struggling for power after the failure of the Blanquist conspiracy of 1839 and oriented instead toward the goal of establishing communist cooperatives and colonies under the influence of Owen and Cabet. But as the Babouvist movement had done in France, the League maintained the tradition of clandestine revolutionary organization in Germany. The League of the Just was renamed Communist League (*Bund der Kommunisten*) in 1847, at the time that Marx and Engels formally joined it. (The Communist Correspondence Committee which they had set up in Brussels in early 1846 had established contacts with the League of the Just from the outset.)

The revolutionary Blanquist, Babouvist, and German organizations represented an indispensable link in the chain that led from the bourgeois revolutions of the sixteenth, seventeenth, and eighteenth centuries to the revolutionary proletarian action of the nineteenth and twentieth centuries. Their main achievements were:

(a) The realization of the need for political action for the conquest of power, a realization that grew out of their understanding of the main lessons to be drawn from the bourgeois revolutions, and perhaps even all revolutions of history. These lessons were not learned by all. They were not widely understood among the adherents of socialism or accepted among the new wage-earning working class. Quite the contrary, apoliticism prevailed in both these milieus, either as a result of skepticism and disgust with traditional bourgeois and petty-bourgeois political action ("the workers always end up being tricked by politicians and politics"), or as a result of a lucid but incomplete balance sheet of contemporary revolutions.

Indeed, as far as the working class was concerned, these revolutions had led to the substitution of one group of exploiters by another, and by no means to genuine emancipation. The utopian socialists and workers

on the road to self-organization therefore drew the conclusion that political action was deceitful and useless: all efforts should be concentrated on economic emancipation. The type of organization should be consonant with that goal.

By contrast, Babeuf, Blanqui, and Weitling had understood, albeit to different degrees, that political power played a key role in the consolidation of the exploitation imposed upon the proletarians and pre-proletarians. That is why they advocated political action of a new, proletarian revolutionary type, with a view to overthrowing the bourgeois state. They adapted their form of organization to the goal they set.

(b) The advocacy of a revolutionary vanguard organization. Starting from an acute awareness of the power and efficiency of the bourgeois repressive apparatus and counter-revolutionary potential of the bourgeoisie, Babeuf, Blanqui, and Weitling were convinced that only a nucleus of deeply motivated, hardened, and disciplined revolutionaries could overcome this powerful enemy. They believed the main lesson of the defeat of the "Fourth Estate" in the French Revolution and aftermath of the 1830 revolution, was not the futility of popular revolutions allegedly doomed to defeat, but the inevitability of the defeat of the toiling classes if they rose against the rich without a iron leadership and organization. They were convinced that, led by this sort of minority, one well-prepared for its historical task, the toiling classes could triumph in future revolutionary confrontations. In this sense, Babeuf, and more particularly Blanqui, were obvious forerunners of the Leninist concept of "professional revolutionaries."

(c) Defense of revolutionary tradition and continuity. As Thermidor, the Consulate, and the Empire all followed the achievements of the great French Revolution of 1789 to 1793, the popular masses and progressive intelligentsia of France and Europe displayed immense disappointment, a phenomenon comparable in some respects to the waves of disillusionment, skepticism, and "reprivatization" that developed after the defeats of the revolutions of 1848 to 1850, later, after people realized the extent and meaning of the Thermidor that unfolded in the USSR in the 1930s and 1940s, and still later, after the hopes for revolution in Europe ebbed in 1975–1976. Some of the most prominent intellectuals of the time who had been enthusiastic supporters of revolution, like the German philosopher Immanuel Kant and the English poet William Wordsworth, became reactionary opponents of revolution. There were some exceptions, however, like the English poet Percy Bysshe Shelley, who remained a convinced revolutionary.

This wave of ideological reaction generally caused a retreat toward purely legalistic and reformist (gradualistic) conceptions of action and organization among the radical democrats involved in political activity and the wage earners involved in trade-union activity.

Against this wave of adaptation and capitulation to the ideology of the ruling class, the first pre-proletarian and proletarian revolutionary nuclei upheld the revolutionary tradition of the eighteenth century after submitting it to the most extensive critical review that revolutionaries of that time could undertake. This continuity made it much easier for new, purely proletarian traditions and conceptions to emerge on the basis of the revolution of 1848.

Nevertheless, alongside the merits of Babeuf, Blanqui, and Weitling, the flaws of their revolutionary projects must be noted:

(a) They conceived the struggle for political power as emanating essentially from a very small minority of society, and even of the popular classes. This necessarily imparted to the projected revolutionary action a violent and conspiratorial character, in which the "technique of the coup d'état" was more important than political mass action properly speaking. Since the ability of a small group of conspirators to eliminate in a single blow powerful repressive apparatuses like the French and Prussian states was quite limited, the struggle took on putschist and utopian features.

(b) The revolutionary organization suitable for this sort of political activity was necessarily clandestine and elitist, the product of a selection so severe that few individuals could endure it for a long time. The small nature of the organization in turn intensified the putschist nature of the activism, as well as the tendency to neglect involvement with broad spontaneous mass movements, economic class struggles, etc.

(c) Essentially clandestine organizational efforts and essentially insurrectional activities led these revolutionaries to a definitely elitist and authoritarian conception of the state that would emerge from a victory of the revolution. This new state would serve the people, would be for the people, but power would not be exercised directly by the people. (Weitling, who was more directly proletarian than Blanqui, was more cautious about the latter point.) Here, too, the link with the real emancipation movement of the wage earners was not, or was insufficiently, established.

(d) The revolutionaries of this lineage defined the social and economic goals to be achieved by the revolution in only vague (especially Blanqui) or utopian (in Weitling's case) terms, because they lacked the adequate data and knowledge of economics and, more importantly, because they

failed to develop an adequate analysis of the nature and contradictions of capitalism. In this regard, Babeuf, Blanqui, and Weitling did not even reach the level of the utopian socialists and the most daring post-Ricardian economists.

In the last analysis, these weaknesses and omissions of the first pre-proletarian and proletarian revolutionary nuclei can be explained by their social nature and the environment in which they developed. They were organizations emanating from the pre-industrial, artisanal, and manufacturing proletariat, which were not yet able to generalize, and sometimes even understand, the actual industrial proletariat's first experiences of mass struggle and organization. In fact, they were striving to combine the petty-bourgeois Jacobin tradition of the great eighteenth-century revolutions with the organizational experience of the pre-industrial proletariat, not to draw conclusions from the first revolutionary experiences of the industrial proletariat itself.

Marx and Engels had to supersede these inadequacies in a systematic way and to elaborate their own conceptions of proletarian revolutionary organization and action. Drawing on the lessons of the revolutions of 1848 to 1850, they developed a distinctive conception of the proletarian revolution:

(a) Revolutionary political action—that is, the struggle for the conquest of power—was conceived as the product, in the main, of the activity of the broad masses of wage earners and their direct allies, but above all of the proletarians themselves. The economic potential of the wage earners was decisive (*Alle Räder stehen still, wenn Dein Starker Arm es will*: All the wheels stand still, when thine stronger arm so wills); their numerical increase to the point of becoming a majority of the nation was considered one of the essential preconditions for a lasting victory of the revolution.

(b) For this reason, legal political organization—the constitution of the proletariat as a political party independent of the bourgeoisie and petty-bourgeois democracy—was considered essential to revolutionary victory. The organization of secret societies was discarded, except under conditions of extreme repression, and even then, it was restricted to maintaining continuity and was not to be an instrument for the seizure of power. Putschism was resolutely condemned.

(c) The project of self-organization of the proletariat—at once to prepare for the exercise of power, to conquer power, and to actually exercise it—was put forward as a priority. Elitism and authoritarianism

were rejected along with the excessively "instrumental" conception of the state. Whereas Babeuf and Blanqui had favored a strong state in the Jacobin tradition, Marx and Engels, under the influence of the revolutions of 1848–1850 and especially of the Paris Commune, advocated the idea of the destruction of the state machine, and conceived of the dictatorship of the proletariat—a concept which Blanqui originated—as a state that began to wither away from its birth.

(d) Marx and Engels closely combined political emancipation (political revolution) with economic and social emancipation. As early as the *Communist Manifesto*, they linked the program of revolutionary seizure of power to a series of economic and social transformations intended to allow the producers to free themselves from the chains of the proletarian condition and enjoy the material conditions necessary for the exercise of power and for the development of all their individual capacities. Short of the achievement of these social and economic conditions, the advent of a genuine classless society would remain a utopia.

Marx's and Engels's ability to supersede the revolutionary conceptions of the first pre-industrial proletarian nuclei was not only the product of a broader revolutionary experience and a deeper understanding of the dynamics of bourgeois society and the conditions necessary for the victory of socialism, that is, of the advances achieved by historical materialism. It also and obviously corresponded to the class interests of the proletariat, whose own distinctive outlook it expressed.

6

The Fusion of the Real Workers Movement and Scientific Socialism

Mass organization of workers by the workers themselves began in Britain, the cradle of the Industrial Revolution and large-scale industry. It began there, in fact, before the spread of large factories. It dates as far back as the second half of the eighteenth century, at which time the British proletariat was employed mainly in artisanal, manufacturing, and agricultural firms.

Its main form of organization was the association of artisans/journeymen (often benevolent societies; in France, the *compagnonnages*) which constituted a genuine bridge between semi-feudal corporations and modern trade unions. Their narrow outlook and concerns, their localism and corporatism reflected the past. But their main forms of struggle prefigured the future: strikes and actions against strikebreakers, tenacious solidarity, attempts to achieve a minimum threshold of financial strength for self-defense, and more and more democratic statutes and practices evidenced in the holding of general assemblies, the elections of leaders, the formation of committees, the audit of the treasury, and so on.

British employers were frightened by these associations and strikes. Their fear was compounded by the turbulent political nature of the epoch which witnessed the unpopular wars against the French Revolution and the spread of the influence of pro-Jacobin associations like the London Corresponding Society. They therefore passed an act in 1799 banning combinations of workers. In France, a similar interdiction had been promulgated when the Le Chapelier Law was adopted in 1791, confirming the bourgeois nature of the great French Revolution.

The adoption of the Combinations Act obstructed the organization of the young British proletariat, but did not bring it to a halt. Organizing

efforts were forced underground and struggles in defense of the material interests of the workers acquired a more violent character. This became obvious first in the Luddite movement (1811–1812) centered in Nottinghamshire; this movement was remarkably well organized and almost totally impermeable to police infiltration, stool pigeons, and strikebreakers. Contrary to the myth spread by the class enemy, the Luddites were by no means opposed to machines in principle.

The goal of their activities was not to eliminate machines from the textile industry, but to increase their wages, to combat the high cost of living and unemployment, and other such classical goals of the first trade unions. The tactic of making machines unusable developed because workers still rented their machines from their employers and operated them at home. Under those circumstances, the workers considered that making the machines unusable was the only way to make the strike really general. The British bourgeoisie was so scared by "the machine-breakers" that it had a bill enacted punishing this "crime" with the death penalty.

Following the fall of Napoleon and the return to peace, a long economic depression hit Britain which condemned hundreds of thousands of workers to unemployment, caused wages to drop, and provoked violent hunger riots. As these riots occurred simultaneously with a resumption of the agitation for universal suffrage, the bourgeoisie further escalated its repressive moves. A large demonstration scheduled at St. Peter's Field, near Manchester, in 1819, was drowned in blood by the Duke of Wellington, the winner of the battle of Waterloo. This caused radical pamphleteers to dub it "the massacre of Peterloo." Many historians consider this massacre the spark that gave birth to the modern British labor movement.

From that point onward, the movement followed a two-level trajectory. On the one hand, underground and semi-legal trade unions multiplied, along with economic strikes. The pressure to repeal the Combinations Act mounted steadily; among those who supported the repeal were the more intelligent employers who understood that if strikes were going to happen, it was preferable to deal with legal and authoritative representatives of the workers, with whom a prompt end to the strike could be negotiated, rather than have the strikes drag out over long periods. The act was finally repealed in 1825. The professional associations of workers systematically adopted the name of "trade unions" (unions of a craft) as early as 1824 and 1825. They rapidly overcame their narrow localist and corporatist outlook.

On the other hand, the agitation for universal suffrage begun by William Cobbett in the 1815–1819 period, at which point it had culminated in the Peterloo rally, was revived by a new campaign in 1830–1832. This time, it led to the adoption of the Reform Bill of 1832, a law drafted by the Liberals to increase the representation of the cities. After the failure of the Liberals to obtain further advances in Parliament, this agitation led to the creation of the first mass workers party, the Chartists. This movement borrowed from the agitation of 1815–1819 the tactic of mass petitions as its main weapon of struggle. Its goal was to collect signatures in favor of a charter demanding universal suffrage. Launched in 1837–1838, the campaign began with an impressive rally of 150,000 people in Glasgow, Scotland. That city had already been the site of a successful fusion of the economic and political struggles of the working class in 1819–1820, when 60,000 workers, mainly miners, struck for universal suffrage.

The first attempts to achieve autonomous organization and action of the working class occurred around the same time on the European continent and in the United States. In the United States, artisans created the first local workers party in history in Philadelphia, in 1828. In France, the first purely working-class insurrection—that of the *canuts*, the weavers of the area of La Croix Rousse—was attempted in Lyons, the capital of the French silk industry, in 1831; the workers held the city for several days. And in Germany, the revolt of the weavers of Silesia, immortalized by the great poet Heinrich Heine, took place in 1844.

In Belgium, the most industrialized country of the European continent, the workers of the Ghent spinning mills attempted to create trade unions as early as 1810–1815. Following the revolution of 1830, petitions were sent to Parliament by Ghent workers demanding universal suffrage, freedom of association, total freedom of the press, and the establishment of an inheritance tax. They were supported by workers in Brussels and Liège. In 1836, the first workers' political meeting took place in Brussels, at the initiative of Jacob Cats, the author of the first workers' catechism, a document that undeniably influenced the young authors of the *Communist Manifesto*, also written in Brussels.

Finally, one should note the emergence of Proudhon's current among the utopian socialist sects. Contrary to the Saint-Simonian, Fourierist, and Owenite groupings, this was a current of purely working-class origin. Proudhon, like Weitling, was a self-taught worker, albeit an

artisanal worker. Appearing on the historical scene later than his great forerunners, he tried, like Marx and Engels, to incorporate lessons drawn from classical German philosophy and English political economy into the socialist doctrine. But he did so on the basis of insufficient and poorly assimilated knowledge, with an obvious lack of scientific maturity, which reflected in the last analysis the particular social situation of the French crafts and pre-proletariat.

As he saw it, the objective was to emancipate the workers-craftsmen from the domination of money (capital) without abolishing commodity production and competition: a typically artisanal, petty-bourgeois illusion. While Proudhon has sometimes been presented with some justification as the father of the idea of workers' self-management, his system quite clearly also contained some of the dead-end "solutions" typical of "market socialism." We are now in a position to witness the economic results of this sort of solution in post-1970 Yugoslavia. The political and social risks that arose from his dead-end economic proposals became also visible there, namely, the risk of breaking the working class up into groups competing with each other, their monetary incomes depending on each group's performance on the market.

Despite their very great diversity, all these initial attempts at autonomous action and organization of the direct producers (workers) shared certain common features that made them the true initiators of the modern labor movement. The movement was therefore born before Marx and Engels, and independently of their activity or, for that matter, of the activity of any intellectual agitator or (utopian) "theoretician." It was the direct product of the exploitation and poverty suffered by the workers under the capitalist regime, the immediate product of bourgeois society.

As a matter of fact, if "responsibility" for the struggles of the working class had to be laid at the doorstep of some figure, that figure would be the employing class, through the day-to-day, permanent, ruthless class struggle it wages against the wage earners with the help of its capital and its state.

The great merit of the first actions and organizations of wage earners mentioned above, was the conquest of class independence—the realization that workers needed to organize themselves, separately from their bosses, whether in groups large or small, with a view to defending their own interests which were different from those of the bourgeoisie and petty bourgeoisie, including the latter's most radical political wing. This enabled thousands of workers to achieve an initial level of class consciousness: economic, trade-union class consciousness, which, when it

becomes massive and permanent, must be considered an enormous leap forward compared to the atomization and disorganization of the workers before their first attempts at resistance.

Finally, these first attempts of the working class at collective action and permanent organization developed the essential forms of struggle which were to mark the class struggle throughout the entire world to this day: strikes and forms of organization designed to insure their success (creation of mutual aid and resistance funds, strike pickets, propaganda and action against strikebreakers, education for collective solidarity, etc.); mass demonstrations and processions; mass meetings and rallies; mass circulation press (in England, William Cobbett, who was one of the first political propagandists of the working class and a precursor of Chartism, published 200,000 copies of a special issue of his newspaper, *The Political Register*, containing his "Letter to Laborers and Wage Earners," in 1816); petitions and various forms of agitation for universal suffrage, the generalization of democratic rights, and so on.

Nevertheless, these first manifestations of the independent class action and organization of the wage earners themselves were marked by a series of weaknesses, which almost all these attempts shared:

(a) Their activities and organizations were not continuous. Even the first trade unions did not last very long. The only exceptions were a few craft unions composed of highly skilled trades people who enjoyed a de facto monopoly on the very narrow market for their skills and often defended it with corporatist methods against the entrance of other male and female workers, particularly by trying to exclude women from permanent skilled jobs. Most unions tended to grow stronger in periods of bullish economic activity and to disappear in periods of crisis and unemployment. In contrast, struggles tended to be broad and violent in periods of crisis and milder in economic upswings. In addition to being discontinuous over time, these organizations tended to be fragmented geographically, often only local or regional in reality. Only the Chartists emerged as a genuinely nationwide movement of the class.

(b) Their activities and organizations concerned only a small minority, a very small fraction of the whole proletariat. As a result, they tended to reflect the particularities of each distinct group in both their demands and forms of action, rather than what was common to the class as a whole.

(c) Their demands generally reflected real interests of the workers, but most often only immediate or medium-range interests. When they tried to sketch out a "maximum program," that is, to project the contours of a

society in which the exploitation of humans by humans would be abolished, they generally did so in vague and inadequate terms, borrowing ideas from either the utopian socialists or the most critical post-Ricardian economists, and sometimes even from pure and simple charlatans.

(d) While workers achieved almost complete class independence on the level of economic struggle and organization in the first genuine trade unions (the case of the first cooperatives is a more complex matter), the same was not true in the arena of political struggle and organization. The separation of proletarian democracy from petty-bourgeois democracy is an extremely complex, discontinuous, irregular process, with successive ups and downs and multiple metamorphoses and relapses toward multi-class organizations.

The most typical case is that of England. The more politically active workers first supported the petty-bourgeois agitation in favor of universal suffrage, then they supported the struggle of the liberal Whig Party for the Reform Bill, then they formed their own independent political party in the guise of Chartism, only to fall back into dependence on the Liberal Party beginning in the 1850s and continuing for a long time thereafter.

The same was true for over two decades in Germany, where the first permanent independent workers party was only founded in 1863 by Ferdinand Lassalle, around the demand for universal suffrage; this party fused with the "Marxist" party of Liebknecht and Bebel in 1875.

In France and Belgium, even more time went by before lasting independent workers parties were created. In the United States, Argentina, Mexico, and other countries where the trade-union movement has a dynamic tradition, this second stage of proletarian class consciousness still has not been reached to this day (1993).

Marx and Engels undertook a gigantic effort, for over half a century, to overcome these weaknesses. In the end, they were basically successful, at least in a large number of countries (all the industrialized countries of the nineteenth century except the United States). Their efforts can be described as a gradual, progressive fusion of the real movement of the proletariat toward independent action and organization with the main achievements of scientific socialism which were accessible to the broad masses (not with *all* aspects of the Marxist doctrine):

(a) Marx and Engels participated in the struggle to get the permanent organization of workers into trade unions accepted as the elementary and indispensable form of organization of the working class in its campaign

for emancipation. This led them to oppose the sectarian influence of many tendencies: the Proudhonists, the post-Ricardians, Lassalle's followers, certain dogmatic cooperativist and communist tendencies, and, later, certain anarchist and libertarian tendencies.

(b) Marx and Engels succeeded in gaining acceptance for the principle of independent political organization (the independent political party) of the working class, and for this party's participation in the ongoing legal political struggles of each country, whenever possible, including but not restricted to elections. While their role was that of a stimulator in the struggle for the generalization of trade unions, they were an essential driving force in the fight to extend independent political organization, even though the first successful initiative in this field in Germany was the work of Lassalle.

(c) They strove to unite the workers movement above trade-union and political barriers, above national, ethnic, racial, and continental boundaries, and above sexual divisions. The foundation of the International Workingmen's Association (the First International) in 1864 represented the first fruition of their efforts in this direction. In addition to the British trade unions of the time, this International brought together the first working-class parties and nuclei in Germany, Switzerland, Belgium, Italy, Spain, France, etc., as well as socialist groups or correspondents in the United States (mainly composed of German immigrants), Poland, Russia, Uruguay, Argentina, Cuba, Mexico, etc. This endeavor to concretize proletarian unification was based on democratic and pluralistic organizational conceptions, without which no headway could have been made.

(d) They armed it with clear and precise long-range goals which became the common legacy of the vast majority of working-class organizations around the end of the nineteenth century: collective ownership of the major means of production and exchange; creation of a classless society; and workers democracy based on the self-organization of the proletariat ("the emancipation of the working class will be conquered by the workers themselves").

(e) They established a clear and simple perspective by which these goals could be achieved, a perspective accepted by millions of workers around the world in the early twentieth century: broader and broader organization of the working-class masses into unions and parties (and accessorially into cooperatives, health insurance associations, etc.); steadily more effective education of these masses through propaganda, agitation, and mass action; launching of more and more massive and

more and more generalized struggles, taking the most diverse issues as their point of departure (democratic, national, economic, anti-war demands, etc.); and the combination of these struggles with the contradictions and internal crises of the capitalist mode of production, until the point where this avalanche of mobilizations triggered a struggle for the conquest of power, seen as a genuine social revolution (a profound transformation of the ownership system and relations of production).

(f) They provided a scientific theoretical analysis of the laws of motion and the internal contradictions of the capitalist mode of production to underpin this perspective, explaining why pre-revolutionary and revolutionary crises were becoming inevitable in the long run in that regime.

(g) By the same token, they made possible the integration of the workers' struggle for immediate improvements (reforms) into the drive for a radical transformation of society. As a result, the unification of the real movement and organization of the working class (which always set for itself immediate goals) with the socialist/communist goal became more and more of a reality. This gave the working class extraordinary confidence; it had the feeling of marching from one success to the next, in almost irresistible fashion. The enormous expansion of the workers movement in the period running from the 1890s to the 1920s (in Spain, France, and the United States the climax was reached later in the 1930s; and in Italy, in the 1940s) was a reflection of this self-confidence.

In retrospect, we can see that although this unification provided the basis for a first impressive expansion of the organized workers movement, it was not sufficient to insure the victory of proletarian revolutions. Nevertheless, it was indispensable for the creation of the conditions needed for such victories.

7

The Personal Itinerary of Marx and Engels

Marxism was a product of its time. But it was neither a spontaneous nor an automatic one. For the transformation of the social sciences, the evolution of utopian socialism toward scientific socialism, the supersession of petty-bourgeois and pre-proletarian practices and organizations by proletarian revolutionary organizations, and the consolidation of working-class political independence in mass workers parties to actually take place, at the time when they did, the role of two individuals, Karl Marx and Friedrich Engels, was decisive.

Of course, they were able to play this role because "history needed them," that is, because their activity corresponded to a need felt by many people (mainly proletarians, but also other socialists and communists of their time). The existence of a demand for their work is confirmed by the fact that other people attempted to advance in the same direction. Attempts at syntheses of that sort were in the air at the time. Nevertheless, the precise manner in which these syntheses and supersessions were effected, their exact content and dynamics, were shaped to a large extent by the distinctive personality of the two founders of Marxism. As in most cases, "historical necessity" was filtered through specific personalities who could not alter its fundamental course, but could, to a point, impart their individual imprint and characteristics to it.

Neither Marx nor Engels were proletarians. The former was the son of a well-to-do, petty-bourgeois family. He was born in 1818; his father was an influential liberal lawyer in the Rhineland city of Trier who, although descended from an old family of rabbis, had converted to Christianity for reasons of personal convenience rather than conviction. Through his mother and through his wife, Jennie von Westphalen, Marx was connected to the big bourgeoisie rather than to the toiling classes. Manifestly, his evolution toward communism was not determined by his

own immediate experience, or by his own deprived living conditions (his years of deprivation came after he threw in his lot with the struggle of the nascent proletariat, mainly during his second exile in London in the 1850s and 1860s; his material situation improved in the 1870s). It was essentially the result of his intellectual labor and moral impulses.

The same applies to Friedrich Engels with even greater force. He was born in 1820 into a bourgeois family of textile industrialists based in Barmen, in the Ruhr. He spent the greater part of his life as the manager of a textile mill that his family owned in England. He lived comfortably and left a sizeable estate when he died in 1895. For him, too, the journey toward communism was essentially motivated by intellectual and moral considerations.

But the evolution, the progressively greater social awareness of the two thinkers, was not the result of an intellectual effort detached from the real conflicts unfolding around them. Not only their scientific but also their moral motivation sprang precisely from such encounters with social situations—with workers' poverty, workers' revolts, political struggles—that occurred before their very eyes and influenced them profoundly. It was obviously also the result of a commitment, the resolve not to behave in a purely interpretative and therefore quietist and passive fashion in the face of human misery in general and the "social question" in particular. Marx and Engels quickly decided to act, to bring their activity into line with their beliefs, to tend toward that unity of theory and practice that became at once an epistemological criterion (in the last analysis, only practice can verify the truthfulness of a theory) and a moral obligation.

In fact, their commitment to and involvement in the labor movement became the precondition for their ability to complete their most important contribution to history: the progressive fusion of the real emancipation movement of the workers with the main advances of scientific socialism.

Indeed, the individual journeys of Marx and Engels revolved around a series of encounters and involvements in situations and conflicts that periodically oriented and reoriented them. Together with the results of their critical scientific analyses—that is, the critical examination of the findings of the main social sciences of their time—these encounters determined the theoretical and political positions they defended, as well as their subsequent evolution from neo-Hegelianism to petty-bourgeois political radicalism, from petty-bourgeois democracy to socialism and

communism, and from rudimentary communism to the scientific and revolutionary socialism/communism of their mature years. These encounters included:

(a) The encounter with the proletarian condition, with the poverty of the workers. It occurred right at the very beginning of Marx's journalistic activity as editor (and later chief editor) of the *Rheinische Zeitung* (Rhineland Gazette), following the end of his university studies, in 1842. Exposure to proletarian poverty occurred with even greater clarity in Engels's case, when he was confronted with the living conditions of workers in England upon his very arrival in that country. This experience led him to write the first major work of the two young thinkers. *The Condition of the Working Class in England* (1845) (*Die Lage der Arbeitenden Klasse in England*).

(b) The encounter with proletarian resistance and organization. This encounter took place for Marx mainly during his first exile in Paris and later Brussels, through contact with workers' associations in Paris and Ghent and, most importantly, through contact with the workers of the League of the Just in Paris, London, and Brussels in 1846 and 1847. For Engels, it was the contact with the Chartist groups and groups of trade unionists in the Manchester region that was decisive, along with scattered contacts with groups of workers of the League of the Just in the Ruhr, the entire experience taking place between 1844 and 1847. Moreover, the two founders of Marxism were deeply marked by the contemporary workers' uprisings, particularly the revolt of the Silesian weavers in 1844.

(c) The firsthand experience of the revolution of 1848–1850, which occurred through Marx's and Engels's personal and active participation in the developments of that revolution in Germany, and through the direct and rapid way in which they followed developments of the revolution in France, Austria, Hungary, Italy, etc. In fact, it was only after they had followed the proletarian insurrection of June 1848 in Paris and had drawn a balance sheet of the counter-revolutionary role of the German bourgeoisie that they were able to develop a strategy for the conquest of power based on the logic of permanent revolution in 1850.

(d) The experience of a living proletarian revolutionary organization —the Communist League—between 1847 and the first years of Marx's second exile in London. This experience made the two friends' understanding of proletarian organization far more concrete, and it also prepared and armed them to deal with the political and organizational problems they would face during the 1860s, 1870s, and later.

(e) The experience of the International Workingmen's Association between 1863 and 1873, particularly the effort to involve the British trade unions in it. This was Marx's and Engels's first real encounter with mass organizations of the working class and with a politically and ideologically highly diversified milieu of workers, that is, with the problems of pluralism inside the working class and workers democracy.

(f) The encounter, beginning in the 1860s but more particularly in the 1870s, with new advances of the ethnological and natural sciences—mainly through Darwin and Morgan—which enabled Marx and Engels to refine their conception of historical materialism.

(g) The experience of the Paris Commune, probably the most important political experience during the lifetimes of Marx and Engels, which contributed most extensively to clarifying their understanding of both the theoretical/political question of the state, and the key question of the political goals of the proletarian revolution: the establishment and the form of the dictatorship of the proletariat.

(h) The experience—mainly in Engels's case—of the growth in diversity and potential for unification of the mass workers parties formed in many countries from 1875 to 1895, and the many strategic and tactical problems this raised.

While most of these encounters were fruitful and even exciting for the two founders of Marxism, and while they enabled them to test and refine many of their political concepts and theoretical hypotheses, the truth is that on many occasions this progression took place through conflicts of ideas and persons in which the two became involved, often reluctantly. This "factional" aspect of the activities of Marx and Engels has often been denounced as a reflection of their personal defects, their alleged "authoritarianism," or even their "intellectual terrorism."

In reality, all history confirms that theories and organizations can only advance through the clash of ideas and groupings that differentiate when faced with new events and problems. Believing that this process could take place in any other way would be tantamount to believing either that the individuals and social interests involved were completely undiversified or, alternately, that some of these individuals were infallible, and their infallibility self-evident to all others. Discarding these two absurd hypotheses, it is obvious that tendencies and group struggles are inevitable in politics in general, and in workers' politics in particular.

The successive conflicts and breaks which had the greatest impact on the intellectual evolution of Marx and Engels were, in chronological order:

(a) Their conflict with the contemplative and fundamentally liberal "Young Hegelians," as well as with Moses Hess, with whom Marx and Engels broke in the 1844–1845 period. This break was expressed theoretically in *The German Ideology* (1846) and the *Theses on Feuerbach* (1845), a genuine birth certificate of Marxism. It was based on an extensive critical appropriation of the advances of German philosophy and French sociological historiography, but only a partial appropriation of the advances of English political economy.

(b) The conflict with Proudhon's utopian socialism and Weitling's insufficiently mature communism, a conflict which spread out over the years from 1846 to 1848, and which led to the writing of *The Poverty of Philosophy* (1847) and the *Communist Manifesto* (1848). This conflict occurred in combination with less violent clarification fights inside the Communist League, which continued beyond the revolution of 1848 into the early 1850s.

(c) The conflict—sometimes in the guise of a critical intellectual appropriation, sometimes in the guise of an "internal dialogue"— with the main representatives of post-Ricardian English political economy: Hodgskin, Ravestone, and Gray. This led Marx to write his major economic works—the *Grundrisse*, *Capital*, and *Theories of Surplus-Value*—during the two decades from 1857 to his death.

(d) The conflict with Bakunin and his supporters inside the First International (1865–1872), which continued for a while after the defeat of the Paris Commune.

(e) The conflict with various rightist tendencies in German social democracy: first, the Lassalleans; then, the early representatives of reformist gradualism—a fight that began with the unification Congress of Gotha in 1875, extended beyond Marx's death, as Engels carried on the struggle alone throughout the 1880s, and ended in 1895 when Engels himself died. The main products of this conflict were the *Critique of the Gotha Program* (1875) by Marx and *Anti-Dühring* (1878) by Engels.

The chronology of these conflicts seems to be a chronology of the main works of Marx and Engels. For the only titles missing from this list are their political writings (such as *The Eighteenth Brumaire of Louis Bonaparte*, *Class Struggles in France*, *Revolution and Counter-revolution in Germany*), their journalistic writings, and *Origin of the Family, Private Property and the State*, as well as Engels's *Dialectics of Nature*.

Except for one trip by Engels to the United States toward the end of his life, the actual experience of the two founders of Marxism was purely

European. Their thought was deeply affected by Europe's distinctive social and intellectual history. As a result, they have often been reproached with "Eurocentrism," and even German particularism. However, these reproaches have no basis in reality.

Marxism is, of course, a product of the maturation of the contradictions of bourgeois society which undeniably appeared first in Europe. In this sense, it could not have been developed in Asia, the Americas, or Africa, which experienced only a rudimentary form of capitalist development during most of the nineteenth century.

But although Marxism was born in Europe, it had from the outset an international, and even a worldwide, dimension which made it dependent on everything that happened on other continents. The violent, disruptive, destructive, and inhuman impact of capitalism on pre-capitalist societies in the Americas, Asia, and Africa was far worse than its impact on pre-capitalist society in western, southern, central, and eastern Europe. Marx and Engels were, as scientists, too rigorous and, as humanists, too passionate not to notice this, not to be indignant about it, and not to revolt against these abominable crimes.

As a result, the perception of the "Third World," of its degradation and inevitable revolt, was quickly integrated into their writings, after occupying only a small place in the writings of their youth. It is enough to recall their resolute support for the Indian sepoys and the Chinese Taipings, and for the emancipation of the American slaves, to reject the accusation of Eurocentrism. In the same vein, they branded the joint French, Spanish, and British expedition against Mexico as "one of the most monstrous undertakings in the annals of international history" (23/11/1861, *MEW*, Vol. 15, p. 366). Additionally, Marx's and Engels's steadily more advanced investigation of the "Asian mode of production," of ethnology, of the particularities of non-European civilizations and societies, and of the Russian village community (*mir*), occupied a growing place in the intellectual work completed during the last two decades of their lives, and left a more and more marked imprint on their writings—including *Capital*.

In the same way, the international sources and resolutely internationalist activities of the two friends justify the rejection of the accusation of German nationalism leveled against them, and reveal this accusation straightforward slander. On the plane of ideas, the sources of Marxism are to be found in France and Britain as much as in Germany. On the plane of practice, the experiences and activities through which it participated in the political life of its time were located in France, Belgium,

England, and the countries of the Austro-Hungarian Empire as much as they were in Germany. Their practices also concerned Poland, Ireland, Hungary, Spain, Switzerland, and even the United States and Russia. As for their organization, it was, from the start, not purely German but international. This was already true of the Communist League. It was also true of the International Workingmen's Association (IWA). And it would be even truer of the spread of international social democracy after 1885, which led up to the creation of the Second International. In the countries where their supporters were beginning to organize, Marx and Engels urged them to study the concrete social formation of their country, to incorporate the local traditions of struggle, and to translate their program into the language of the existing workers and radical organizations; this was the general message of their *Letters to Americans*, written from 1848 to 1885.

One of the greatest successes of their political life, and a source of genuine and legitimate pride for them, was the stand taken by their German comrades, Bebel and Liebknecht, when they opposed Germany's annexation of Alsace-Lorraine in 1871 and the first Peace of Versailles. Their attitude was the same, some time before, when the IWA—British trade unions in the lead—opposed the pro-Confederate policy of the British government during the Civil War in the United States. For the constant ambition of Marx and Engels in their political life was to bring the working class of each country to develop its own foreign policy, based on its own class interests and a few great principles that flowed from them ("no people can be free as long as it oppresses another"). This was exactly the opposite of nationalism, let alone German nationalism.

Marx and Engels were undeniably the product of their epoch. They could not completely rise above all the subjective limitations determined by the still excessively fragmentary experiences of proletarian and human emancipation. They were not infallible. They could not understand everything, explain everything, predict everything, even though they undeniably understood, explained, and predicted what was essential. They had their failings.

For example, Engels was mistaken when he called the small Slav nationalities in 1848–1849 "peoples without history," incapable of constituting states or even truly independent nations. History proved him wrong in this respect. And Marx was wrong when he applauded the annexation of California and other Mexican territories by the United

States in 1845, and when he characterized the Mexicans as "lazy" and incapable of exploiting the natural wealth of these territories. He repeated a racist prejudice in doing so.

In both cases, a judicious application of historical materialism would have made it possible to explain the specific behavior of different actors in the 1845–1855 period, producing very different conclusions than those reached by Marx and Engels. It would have made it possible to explain the second Mexican revolution (the Reforma) led mainly by Benito Juárez, a revolution which followed the war between Mexico and the United States to which Marx alluded. It would have made it possible to explain the birth of an anti-tsarist and democratic Czech and Serbo-Croatian left that was at once fiercely nationalist and socialist, an outcome deemed impossible by Engels. In both cases, Marx and Engels were insufficiently Marxist. They should have used class criteria to interpret seemingly confusing political phenomena, such as the sudden turnaround of the Czech and Serbo-Croatian peasantry and intelligentsia during the revolution of 1848, and the apparent passivity of the Mexican peasantry before the Yankee conquest.

Similarly, while they developed an acute awareness of the dual oppression of women in class society, and extended the analysis of the origins of that oppression to the very beginning of that society, Marx and Engels were not able to encompass all the necessary aspects of women's emancipation that progressively emerged in the twentieth century.

Even with these qualifications, the overall balance sheet of the two friends' theoretical and practical activity is more than impressive. Their personal contribution to the progress of the social sciences and to proletarian and human emancipation places them at the summit of human achievement. Without them, the history of the nineteenth and twentieth centuries would not have been what it was.

8

The Reception and Diffusion of Marxism throughout the World

The explanation of the origins, content, and development of Marxism must necessarily conclude with an analysis of its diffusion and real influence in the world. In the long run, ideas and overall bodies of ideas, that is doctrines, are worth what their impact on real history is worth. Ideas that never influence anything or anyone are necessarily marginal, even in the spiritual history of humanity, not to mention, of course, its material history. "Theory becomes a material force when it takes hold of the masses," the young Marx said.

The question of the time lag must of course be eliminated from this line of reasoning. Ideas that influence the world more and more some fifty or one hundred years after they were first formulated are obviously more important than ideas that achieve an immediate impact but gradually decline thereafter, to the point of disappearing from the political scene.

The decisive criterion of the value of doctrines, then, is whether their social impact is reflected in material reality, sooner or later, on a broad and growing scale. Specifically when dealing with the ideas that purport to strengthen the workers movement, socialism, and the universal cause of human emancipation, these ideas must also be reflected on a worldwide scale, as befits the worldwide nature of the "social question," the exploitation of the wage slaves, the oppression of the proletariat and all other oppressed human groups around the world: women, nationalities, races, etc.

Finally, the particular characteristics of the proletariat—its position of economic and ideological subordination within bourgeois society, a subordination that is not overcome by its growing organization, combativity, and social weight—entail that the specific (and sometimes

deformed) version in which Marxism is transmitted to the large working-class organizations and popular masses at a given historical stage, leaves a definite imprint on the evolution of class consciousness. The latter combines with the former in a sense, positively or negatively depending on the circumstances. But this articulation cannot in turn be detached from the real march forward of the proletariat's organization and struggle, that is, the real march forward of history.

The reception and diffusion of Marxism throughout the world must therefore be examined on several successive levels:

- the narrow level of the diffusion of the writings of Marx and Engels;
- the level of the influence of Marxism's ideas outside the workers movement properly speaking—that is, in intellectual and academic milieus, and more generally in "the spirit of the time" (the dominant ideologies of the successive phases through which bourgeois society has passed);
- inside the organized workers movement;
- inside the broad working class;
- at the international level.

The circulation of the various writings of Marx and Engels was very uneven and marked by fits and starts. Some of their writings had a relatively rapid and broad impact, chief among them, the *Communist Manifesto*, which was translated into a large number of languages and distributed in tens and then hundreds of thousands of copies (although, even in this case, one had to wait until the 1920s and 1930s for its diffusion to become truly universal and be counted in the millions). Volume One of *Capital* also experienced a relatively rapid diffusion in a large number of languages, although on a smaller scale than the *Communist Manifesto*, usually a few thousand (not tens of thousands) copies in each language. The diffusion of almost all their other works, save for Engels's *Anti-Dühring*, was far more uneven and limited.

In this regard, one should note that some of the major works of Marx and Engels were only published for the first time after a considerable delay, even in German, their original language. The *Critique of the Gotha Program* and Volumes Two and Three of *Capital* were only released in print twenty years after they were written; *The German Ideology* and the *Grundrisse*, some eighty years after they were written. This meant that three successive generations of Marxists did not have access to an adequate overall view of the doctrine of Marx and Engels, often only through sheer lack of information and data.

We should note that some of Marx's manuscripts still have not been published to this day. The last of his major economic works was only published in 1983.

However, works by popularizers of Marxism have generally had a far broader impact than the writings of the great masters themselves. In this respect, special mention should go to the brochures of Karl Kautsky, above all *The Economic Doctrine of Karl Marx* and the *Erfurt Program* (of the SPD), of which hundreds of thousands of copies were printed in many languages. Other popularization authors had a similar impact on a narrower scale, that is, in one or a few languages. Among these were Bebel in German, Guesde and Lafargue in French, Labriola in Italian, Iglesias in Spanish, Gorter in Dutch, Plekhanov in Russian, and De Leon and Debs in the United States. Their writings were far more widely read by the first generations of socialists than were the works of Marx and Engels themselves.

The reception of Marxism in the academic and intellectual circles was even slower and more irregular. This should not surprise us. The reluctance of the bourgeoisie and upper layers of the petty bourgeoisie to take Marxism seriously on the intellectual plane was commensurate with the intransigent opposition of Marx and Marxists against not only the material interests of bourgeois society, but also against its most cherished "values." The very fact that Marxist ideas were gaining greater influence among the masses was an additional argument for keeping them out of the educational system, the universities, the "official" textbooks. Save for a few rare exceptions—such as the Austrian economist Böhm-Bawerk, the Italian philosopher Benedetto Croce, and the leader of the Czech bourgeoisie Thomas Masaryk—the authoritative representatives of bourgeois ideology did not deign to polemicize against Marxism with a minimum of theoretical seriousness. This situation only changed toward the end of World War I, with the victory of the Russian Revolution, the upsurge of the European labor movement from 1918 to 1923, the spread of communism in China, and, a bit later, the economic crisis of the 1930s. Marxism progressively penetrated the academic world, first in central Europe and China, India and Japan, then in the Anglo-American sphere. In France and Latin America, it only made a major breakthrough in intellectual milieus after World War II.

During the entire period of 1875 to 1900, polemics about Marxism were essentially confined to polemics inside the Socialist movement, under the stimulus of debates, attempted revisions, and successive schisms, chief among which was the revision undertaken by one of

Engels's main intellectual collaborators and executors, Eduard Bernstein.

All in all though, Marxism did have a growing, albeit sometimes an indirect, influence on the academic social sciences, mainly historiography and sociology, by introducing an increasing awareness of the importance of the "economic factor" and of social groups (as opposed to "great men") in history. Thus, it refashioned the very concept of history, from a history of states and essentially political and military events, to a history of *societies*.

Marxism's impact on "official" economics was more belated. It affected mainly the field of the theory of economic fluctuations (business cycles), then that of large aggregates (macroeconomic theory) especially from the 1930s, then the fields of planning and the analysis of imperialism and underdevelopment, and finally that of the analysis of post-capitalist societies.

The influence of Marxism inside the organized workers movement only developed in a decisive way with the creation of the large mass Social Democratic parties in the years from 1885 to 1900 (in Germany, 1875 to 1900). But it never achieved more than marginal influence in the mass trade unions of the Anglo-American cultural sphere. The same is basically true of the Labor parties which emerged successively from these mass trade unions in Australia, Britain, New Zealand, and most recently, English Canada.

The Social Democratic parties that eventually came together to create the Second International (through two rival congresses in Paris in 1889, a second united congress in Brussels in 1891, and a third, equally united, congress in Zurich in 1893) generally adopted the fundamental theses of Marxism in their programs or professions of principle. Most were modeled on the *Erfurt Program* drafted by Kautsky with the close collaboration of Engels himself.

Undeniably, this was a rather summary version of Marxism, boiled down to a few central ideas: the class struggle; the socialist goal of that struggle, through collective ownership of the major means of production and exchange; the conquest of political power to achieve that goal; and international solidarity of the workers. But compared to the ideology of the first organizations of the working class, whether trade unions, cooperatives, or political organizations, the doctrine that was thus popularized constituted a quite coherent whole which represented an enormous advance, especially since it was able to influence broad masses, unlike the first communist sects and leagues.

Its main weakness lay in its narrow determinism, verging on fatalism,

that saw the supersession of capitalism by socialism in a more or less inevitable fashion, occurring under the combined impact of economic evolution and socialist organization (of the workers), but failed to stress the political initiative and conscious action of the party and the masses. This often implied downplaying, even disparaging, direct mass action, not to mention revolutionary action and the destruction of the bourgeois state ("*Generalstreik ist Generalunsinn*": general strike is general nonsense, the leaders of the German trade unions used to say).

Only after the Russian Revolution of 1905 did a broad international current, embodied essentially by Rosa Luxemburg and the Russian Socialists Lenin and Trotsky, reclaim and revive the Marxist tradition of direct mass action and revolutionary initiative of the party. During the thirty previous years, this tradition had been marginalized inside social democracy (although, to a lesser extent in Belgium) and confined to anarcho-syndicalist and revolutionary-syndicalist circles (in Spain, Britain, Argentina, partially the United States, Italy, and France).

Sometimes though, there was a more direct interaction between the organizational, electoral, and trade-union expansion of international social democracy in the quarter century that stretched from 1875 to 1900 and the actual spread of Marx's ideas and works. A special case deserves mention in this respect, that of Finland. This small country under the boot of tsarism succeeded in the span of one decade, between 1899 and 1911, in creating one of the most powerful and combative workers movements of the world. The rapid ascent of this party was to lead in 1917–1918 to the deepest and most tenacious proletarian (but also the most repressed) revolution outside Russia. In the parliamentary elections of 1913, the Finnish Socialists obtained 43 percent of the vote, the highest figure in Europe, even more than the German Social Democrats. They then extracted from the Diet a decision to publish Volume One of Marx's *Capital*, at Parliament's expense!

The penetration of Marxist ideas and doctrine among the broad working masses during the epoch of the Second International has generally been exaggerated by historians, including those of the labor movement. In fact, the masses of workers formed their political and trade-union beliefs through the filter of two experiences: their day-to-day struggles for immediate demands (economic goals and universal suffrage, in a few countries national-democratic demands were added to this set); and the regular education dispensed by the socialist press and at socialist rallies. There already was a big gap between Marxism as a coherent doctrine and the summary Marxism of social democratic programs. From these

programs to the practice, to the day-to-day experience and education of the workers, the distance was even greater.

Systematic political education of workers was conducted on an extremely small scale. Marxist theoretical reviews, including the most prestigious one, the *Neue Zeit*, succeeded in reaching only a few thousand subscribers (10,000 in the case of the *Neue Zeit*). The central schools of the parties, including that of the SPD which had one million members, did not bring together more students than the present school of the Fourth International.

This limited penetration of Marxism among the masses can be illustrated by an example. In Milan, the fortress of Italian socialism, public libraries loaned 264,000 books in 1910. Forty-four percent of the loans were to workers, and 32 percent to students. The names of Marx and Engels do not appear once among the authors of books loaned out!

What Marxism brought to the masses, beyond strong political organization and a general understanding of the need to combine trade-union action with class independence and political action—including international action—was a general feeling of "marching with history": the feeling that capitalism was doomed and that socialism must succeed it.

About the manner in which the transition from the former to the latter would take place, there were few precise ideas and little substantive debate. Serious discussion was basically confined to the spheres of the most involved political activists, and even to the upper spheres of the party. It engaged thousands of individuals, whereas the Socialist movement numbered in millions. It only penetrated deeper into the masses toward the end of the 1914–1918 World War, that is, when it was posed in practice under the combined impact of the war and the great proletarian revolutions that emerged from it: the Russian, Finnish, German, Austrian, and Hungarian revolutions, as well as the revolutionary crisis in Italy.

Nevertheless, Marxist doctrine had a deep effect on the masses, sometimes through indirect and unforeseen mediations that should not be underestimated. An example of this sort of progression is the struggle for the shortening of the workday to eight hours.

Marx was the great propagandist and the great educator of the international workers movement on the emancipatory value and importance of the shortening of the workday. The idea of an international action by male and female workers for a class goal common to the proletarians of all countries is also clearly an idea of Marxist origin. But in practice, the decision to turn May Day in all countries into an international day of

strike for the eight-hour workday became widely accepted only after five anarchist leaders in Chicago, the Haymarket martyrs, were accused of having thrown a bomb at the police, condemned to death, and executed in 1886. This tragedy was needed to inflame the imagination and sensitivity of the workers on a mass scale. It was the event that triggered a powerful and, in the long run, an irresistible movement (the eight-hour day was eventually won in almost all industrialized countries); the spark of Marxist thought and propaganda alone proved inadequate for that job.

A certain confusion developed among the masses around the end of the nineteenth century, as the revolutionary content of Marx's and Engels's doctrine was undermined from within social democracy by Bernstein's revisionism and the ministerial collaboration advocated and then practiced by Millerand in France and by Bissolati in Italy. The confusion was particularly grave because this revisionism, although rejected on the plane of ideas by most well-known social democratic leaders identified with Marxism, actually corresponded increasingly to their day-to-day practice. This was particularly true of Anseele and Vandervelde in Belgium, Troelstra in the Netherlands, Branting in Sweden, Stauning in Denmark, Greulich in Switzerland, Palacios and Justo in Argentina, and, to a large extent, Victor Adler in Austria. Only Bebel in Germany, Guesde in France, and Sen Katayama in Japan were intransigently consistent in their opposition to the revisionist practice and theory spreading during this period. But Bebel's and Guesde's intransigence crumbled in the years that followed the Russian Revolution of 1905, around 1910. (Guesde became a minister in the so-called Sacred Union bourgeois coalition government of 1914.) Only Katayama remained an intransigent Marxist.

While it is true that Marxist theory was not widely disseminated among the masses in its original and integral version, another myth needs to be refuted; namely, the claim that even the few key ideas of Marxism incorporated into their program and propagated by the first mass Social Democratic parties did not really influence the consciousness of the masses. This claim is particularly wrong with respect to internationalism. There were in fact impressive practical demonstrations of proletarian internationalism in the heyday of the Second International. It was precisely because this practice had existed that the betrayal of August 1914 appeared so disorienting to the broad masses, and monstrous to the Socialist left.

Shortly after the outbreak of war between Russia and Japan in 1904, the

Socialist leaders of these two countries, Plekhanov and Sen Katayama, embraced at the Congress of the International in Amsterdam, and proclaimed their shared opposition to the war and to the ruling classes of their respective countries who had provoked it. When the Russian Revolution of 1905 broke out, it elicited a powerful movement of international solidarity. In fact, it triggered a radicalization of the workers' struggles in several countries, notably a general strike for universal suffrage in Austria. When the Swedish bourgeoisie tried to stop the movement for Norwegian independence by a military intervention in 1906, the congress of the Swedish Social Democratic Party decided to oppose the war by all means, including a general strike, and organized a gigantic demonstration in Stockholm that forced the government to back off.

In 1913, the Italian Socialist Party, despite a chauvinistic campaign supported by one-third of its own parliamentary caucus, organized a general strike against Italy's colonialist expedition to Tripoli, Libya.

At that point, Marxist education, the deepening and enrichment of Marxism, and its application to the new analytic and strategic problems posed by the onset of the era of imperialism were pursued mainly by the Socialist left. This left developed mainly inside the Social Democratic parties themselves until 1914 (1917 and even 1920), although in several countries—Russia, Poland, and Netherlands, Bulgaria—it led to splits even before World War I. Elsewhere, revolutionary-syndicalist currents developed certain aspects of Marxism outside the Socialist parties. This Marxist left was to lead up to the creation of the Third International following the great revolutions of 1917 to 1919.

The most striking phenomenon of this entire period of growth of mass political parties influenced by Marxism was the worldwide extension of its influence, touching successively western and central Europe, then the United States, southern and eastern Europe (Russia, the Balkans), Asia (Armenia, Georgia, Iran, Japan, China, India, Indonesia), Latin America (Argentina, Uruguay, Brazil, Mexico, Cuba, Chile), Australasia (Australia, New Zealand), and Africa (Egypt, Tunisia, South Africa).

By rebound, but with some delay, the specific problematic of the colonial and semi-colonial countries was progressively integrated into Marxist analysis and practice, particularly after the Russian, Iranian, and Chinese revolutions of 1905 to 1912. It should be noted that this process basically did not take hold during the Mexican revolution of 1910 to 1917, the last great contemporary revolution in which no clearly Marxist current emerged.

At the end of the third congress of the Socialist International held in Zurich, on August 12, 1893, Friedrich Engels, who was seated in the hall as a simple delegate, was carried to the podium by an immense ovation. Moved by the gesture, the old militant regretted that Karl Marx, his companion of so many struggles, had not witnessed this upsurge of the worldwide organized labor movement. He then expressed his unshakable confidence in "the new, stronger, invincible International." Glancing back over the fifty-two years of his political life, looking at the cities of Vienna, Berlin, Paris, and London, he proclaimed that Marx and himself had not struggled in vain, that they could look back on their work with "pride and satisfaction." He concluded: "There is not a single country, not a single great state where social democracy is not now a power that all must heed. We are, we too, 'a great power' that is feared. The future depends far more on it and on us, than on any one of the bourgeois 'great powers!'"

Appendices

THE EIGHT MAIN PERIODS OF THE "HISTORY" OF MARX

1. 1837–1843: RADICAL DEMOCRACY
   - Doctoral thesis: "The Differences between the Philosophy of Nature of Democritus and Epicurus," 1838–1841.
   - Editorial work on the Rhineland newspaper *Rheinische Zeitung*, 1842–1843.
   - *Critique of Hegel's "Philosophy of Right,"* 1843.
2. 1843–1844: FROM POLITICAL EMANCIPATION TO SOCIAL EMANCIPATION
   - *The Jewish Question* (Franco-German Yearbook), 1843–1844.
   - *Introduction to Towards a Critique of Hegel's "Philosophy of Right,"* 1844.
   - *Economic and Philosophical Manuscripts* (Manuscripts of 1844), 1844.
3. 1845–1847: FOUNDATIONS OF HISTORICAL MATERIALISM
   - *The Holy Family*, 1844–1845
   - *Theses on Feuerbach*, 1845.
   - *The German Ideology*, 1846.
   - *Letter to Annenkov*, 1846.
   - *The Poverty of Philosophy*, 1847.
4. 1848–1850: FROM THE BOURGEOIS REVOLUTION TO THE PROLETARIAN REVOLUTION ("PERMANENT REVOLUTION")
   - *Communist Manifesto*, 1848.
   - *Wage Labor and Capital*, 1849.
   - *Address to the Central Committee of the Communist League*, 1850.
5. 1850–1852: BALANCE SHEET OF THE REVOLUTIONARY WAVE, CLASS STRUGGLES, AND POLITICAL STRUGGLES
   - *Class Struggles in France* (three essays published in the review *Neue Rheinische Zeitung*), 1850.
   - *The Eighteenth Brumaire of Louis Bonaparte*, 1852.
6. 1853–1859: PREPARATION OF *CAPITAL* . . .
   - Articles (political commentary) for the *New York Daily Tribune*, 1852–1862.

- *Grundrisse* (Foundations of a critique of political economy), 1857–1858.
- *Critique of Political Economy*, 1859.

7. 1860–1867: COMPLETION OF HIS ECONOMIC WORK AND CREATION OF THE FIRST INTERNATIONAL
   - *Mister Vogt*, 1860.
   - *Theories of Surplus-Value*, 1862–1863.
   - *Capital* (manuscript Volume Three), 1865.
   - *Inaugural Address of the International Workingmen's Association*, 1864.
   - *Capital* (Volume One published), 1867.
   - *Capital* (manuscript Volume Two), 1869–1879.

8. 1867–1883: THE PROLETARIAN REVOLUTION ON THE MARCH . . . AND THE WORKERS PARTIES
   - *The Two Addresses on the Franco-Prussian War*, 1870.
   - *The Civil War in France*, 1871.
   - *Critique of the Gotha Program*, 1875.
   - *Anti-Dühring* (by Engels), 1878.
   - *Letter to the Leaders of German Social-Democracy*, 1879.
   - *Letter to Vera Zasulich*, 1881.
   - *Preface* to the second Russian edition of the *Communist Manifesto*, 1882.

A FEW EVENTS OF MARX'S TIME

ECONOMIC DEVELOPMENTS POLITICAL AND MILITARY EVENTS	CLASS STRUGGLES AND REVOLUTIONS	WORKERS MOVEMENT
1757: British Empire established in India after the Battle of Plessey. **1770–1830**: Industrial Revolution: birth of modern factories, first in England, then Belgium, France, Switzerland, the United States, Germany, etc. **1791–1815**: French Revolutionary and Napoleonic Wars in Europe, Santo Domingo, Egypt. Consolidation of the British Empire. **1815**: Defeat of Napoleon and dominance of the Holy Alliance.	**1776**: American Revolution. **1789**: French Revolution; Bastille Prison falls on July 14. **1792–1793**: Highpoint of French Revolution; dictatorship of the Jacobins. **1794** (July 27): Thermidor, victory of the political counter-revolution. **1795–1805**: Revolution of the slaves of Santo Domingo. **1810–1824**: Liberation Wars (first revolution) of Latin America against the Spanish Empire.	**1796**: Babeuf and the Conspiracy of the Equals. **1819**: Peterloo Massacre, near Manchester. **1828**: Creation of local labor parties in Philadelphia and New York.

(*continued*)

A FEW EVENTS OF MARX'S TIME (*continued*)

ECONOMIC DEVELOPMENTS POLITICAL AND MILITARY EVENTS	CLASS STRUGGLES AND REVOLUTIONS	WORKERS MOVEMENT
	1830: Revolutions in France and Belgium; national insurrection in Poland; birth of the "July Monarchy" under Louis Philippe in France.	**1830–1848**: Blanqui and Blanquism. **1831**: First workers' insurrection, in Lyons.
1846: Potato famine in Ireland. **1846–1848**: Mexican-American War.	**1848**: Revolutions in France, Germany, Austria, Hungary, Poland, Italy. **1849**: Defeat of these revolutions. **1851**: Definitive victory of political counter-revolution in France.	**1843**: Silesian weavers' insurrection (Germany). **1847**: Marx and Engels join the Communist League. **1848**: Rise of Chartism in Britain. **1848**: *Communist Manifesto* is written. **1848** (June): Workers' insurrection in Paris.
1848–1873: Expansion of industrial capitalism, free trade, and competition in Britain, France, Germany, Belgium.	**1853**: Chinese revolution of the Taipings.	
1854–1856: Crimean War (tsarist Russia versus the rest of Europe) followed by the emancipation of the serfs in Russia in 1861.	**1857**: Sepoys' insurrection in India. **1857–1867**: Second Mexican revolution (Reforma).	

1859–1866–1870: Unification of Italy. **1861–1867**: French intervention in Mexico.	**1861–1865**: Civil War (second revolution) in the United States. Abolition of slavery.	**1863**: Foundation of the General Association of German Workers by Lassalle. **1864**: Foundation of the First International.
1870–1871: Franco-Prussian War and unification of Germany.	**1871**: Paris Commune.	**1867**: Publication of *Capital*, Volume One, by Marx. Bebel and Liebknecht elected to the German Parliament (Reichstag).
1873–1893: Generalization of colonialism; rapid development of industrialization in the USA, Japan, Russia, Italy, Austria-Hungary.		**1872**: Dissolution of the First International. **1875**: Unification of German social democracy.
	1886: Beginning of struggle for the eight-hour workday in the United States, then around the world; May 1 becomes international day of struggle.	**1883**: Death of Marx. **1889–1891**: Foundation of the Second International. **1895**: Death of Engels.

Glossary

Adams, Samuel (1722–1803): Advocated a break with the English Crown and organized a correspondence committee that acted as a revolutionary nucleus in the Boston region during the period that preceded the American Revolution.

Adler, Victor (1852–1918): Founder and leader of the Social Democratic Party of the Austro-Hungarian Empire; identified with the center-left of the Second International.

Albertus Magnus (1200–1280): Bavarian theologian and philosopher of the Scholastic school; tried to legitimate the Christian faith with rational arguments; supported a crude version of the labor theory of value.

Albigensians: Religious movement that flourished in southern France in the thirteenth century; the pope declared it heretic and the feudal nobility of northern France organized a bloody crusade against it; also known as Cathars.

Anabaptists: Radical Protestant sect of the sixteenth century that called for a return to the ideas of the first Christians and common ownership of wealth.

Anseele, Edouard (1856–1938): Leader of the social democratic Belgian Workers Party; identified with the right of the Second International.

Aquinas, Thomas (1225–1274): Italian theologian, the main Scholastic philosopher of the thirteenth century (*see* Albertus Magnus). His school, called Thomism, borrowed many concepts from Aristotle and Avicenna.

Aristotle (384–322 B.C.): The main philosopher of ancient Greece, one of the most encyclopedic thinkers of all times; was the tutor of Alexander the Great.

Avicenna (980–1037): Arab philosopher and physician of Iranian origin; he reintroduced Aristotle's rationalism into medieval philosophy. Scholasticism (*see* Albertus Magnus) and Thomism are indebted to him. He had many radical followers, the so-called Avicennian left.

Babeuf, Gracchus (1760–1797): French revolutionary of definite collectivist and communist orientation. His Conspiracy of the Equals was crushed and he was executed in 1797. His followers are called Babouvists.

Bagaudae: Literally "beggars," "vagrants"; bands of runaway slaves who fled the estates and cities of their masters from the third to the fifth century A.D., and contributed to the downfall of the empire and the slave mode of production.

Bakunin, Mikhail (1814–1876): Russian revolutionary, one of the founders of anarchism; an opponent of Marx in the First International.

Ball, John (d. 1381): One of the leaders of the English Peasants' Revolt of 1381 (*see* Jacqueries); the chronicler Froissart reported that he defended revolutionary ideas on common ownership of wealth.

Balzac, Honoré de (1799–1850): French author of *The Human Comedy*, a collection of novels which made a perceptive analysis of French society under the Restoration and at the beginning of the July Monarchy (1815–1848).

Bebel, August (1840–1913): Founder of the Marxist German Social Democratic Party, known as the Eisenach Party, which fused with the Lassallean Social Democratic Party at the Congress of Gotha; he became the leader of the united Social Democratic Party and the key leader of the Second International, in which he identified with the center-left.

Bernstein, Eduard (1850–1932): German social democratic leader who initiated the theoretical controversy over revisionism with his book *Evolutionary Socialism* (1899).

Bīrūnī, Abū ar al- (973–1048): Iranian-Arab astronomer and historian who operated in the framework of the conquest of India by Islamic sovereigns, which led him to an interesting comparative study of the civilizations of India, Islam, and ancient Greece; his investigations led him to the verge of historical materialism.

Bissolati, Leonida (1857–1920): Italian right-wing social democratic leader; advocated participation in the bourgeois government as early as 1902; expelled from the Socialist Party in 1912 for his support of the Italian colonial expedition in Tripolitana, Libya.

Blanc, Louis (1811–1882): French utopian socialist and politician; he was made Minister of Labor in the government that emerged during the revolution of 1848, and tried to employ the Parisian jobless in "National Workshops" whose closures subsequently caused the workers' insurrection of June 1848.

Blanqui, Auguste (1805–1881): French revolutionary communist; his doctrine is called Blanquism (*see Chapter 5*).

Böhm-Bawerk, Eugen (1815–1914): Austrian economist, the founder of the marginalist theory of value; wrote *Karl Marx and the End of His System* (1887).

Bolívar, Simon (1783–1830): Born in Caracas, main bourgeois leader of the Liberation War in Latin America (1810–1824); he won the battle of Ayacucho (1824) which ended Spanish rule on the continent.

Bourbons: Ruling dynasty of France from 1589 to 1792; restored to the throne 1815 to 1830 (Restoration).

Branting, Karl Hjalmar (1860–1925): Founder and leader of the Swedish Social Democratic Party, identified with the right of the Second International; he served as a minister in several cabinets.

Bras nus (bare arms): The name given to laborers, pre-proletarians and proletarians in Paris during the French Revolution of 1789–1794; they were one of the components of the sansculottes (*see this entry*).

Bray, John Francis (1809–1895): English and U.S. utopian socialist and economist; made a radical critique of society based on Ricardo's concepts; author of the theory of a currency based on labor, adopted by Proudhon, among others.

Brissot, Jacques-Pierre (1754–1793): Deputy to the Convention, the ruling assembly during the French Revolution, where he was a leader of the most clearly bourgeois party, that of the Girondins.

Buonarotti, Philippe (1761–1837): French revolutionary of Italian origin; a follower of Babeuf, he established the continuity between Babouvism and Blanquism.

Cabet, Étienne (1788–1856): French utopian socialist whose book *Voyage in Icaria* had a great influence on the French working class.

Calvin, John (1509–1564): French Protestant theologian; took power in Geneva and founded a sort of theocratic republic. His doctrine is called Calvinism and had great influence in the Netherlands, France, and Scotland. It was the most bourgeois variant of Protestantism (*see* Luther, Martin).

Campanella, Tommaso (1568–1639): Italian utopian thinker, wrote *City of the Sun*; spent twenty-seven years in prison.

Cats, Jacob (1804–1885): One of the first Belgian Socialists, he worked as a weaver and authored the *People's Catechism* (1839) which notably inspired Engels for the first draft of the *Communist Manifesto*.

Chrysostom, John (c. 347–407): Greek bishop of Constantinople, author of the formula "Property Is Theft."

Cobbett, William (1763–1835): English socialist pamphleteer, one of the precursors of the Chartist movement.

Compagnonnages: Associations of journeymen, originally parallel to the masters' corporations of their craft; in early nineteenth-century France many of these journeymen worked for unrelated employers.

Condorcet, Marie Jean Antoine (1743–1794): French philosopher, economist, and politician who came close to historical materialism in his approach to human pre-history; he advocated equality of the sexes.

Considérant, Victor-Prosper (1809–1893): French utopian socialist, a disciple of Fourier.

Consulate: Conservative government of France (1799–1804) that followed Thermidor and the defeat of the radical currents (*see* Babeuf, Gracchus; Jacobins); it was dominated by Napoleon Bonaparte, who turned it into a more authoritarian empire (1804–1815).

Croce, Benedetto (1866–1952): Italian philosopher, author of an attempt to refute historical materialism.

Darwin, Charles (1809–1882): English naturalist and biologist, author of *Origins of the Species* (1859).

Debs, Eugene V. (1855–1926): Main leader of the U.S. Socialist Party before and during World War I; identified with the left of the Second International.

De Leon, Daniel (1852–1914): American left-wing Socialist who advocated "industrial unions," a prefiguration of certain forms of soviet organization.

Descartes, René (1596–1650): French philosopher and scientist who took refuge in Holland, one of the founders of naturalist philosophy and the modern scientific method.

Diderot, Denis (1713–1784): French materialist and atheist philosopher of the Enlightenment, editor of the *Encyclopédie*.

Diggers: A plebeian communistic current of the English Revolution, in the 1640s; along with the True Levellers of Winstanley, it acted as a left wing of the radical democratic Levellers movement.

Donatists: Christian sect of North Africa from the fourth to the sixth century A.D.; it expressed the interests of the slaves and toilers and aspired to a commonwealth.

Don Cossacks: From the Turkish *kazak*, a "free man"; communities of peasants who took refuge in the Ukrainian steppes in the Middle Ages to escape serfdom; beginning in the eighteenth century, they were used by the tsars as armed detachments.

Enlightenment: The period of the revolutionary struggle of the rising bourgeoisie from 1730 to 1789; the name is derived from the fight against obscurantism (church dogmas and absolutism).

Essenes: Jewish sect from the second century B.C. to the end of the first century A.D., who lived in small communities based on collective ownership; they were fiercely opposed to private property and social inequality.

Fénelon, François (1651–1715): French writer, author of the utopian *The Adventures of Télémaque*, a precursor of the Enlightenment.

Feuerbach, Ludwig (1804–1872): Main representative of the Hegelian left, he turned toward materialism with his critique of religion.

Fourier, Charles (1772–1837): Main French utopian socialist (*see Chapter 4*).

Galilei, Galileo (1564–1642): Italian scientist, a founder of the experimental method in the natural sciences and of naturalist philosophy, a precursor of materialism.

Garibaldi, Giuseppe (1807–1882): Italian revolutionary, led the Expedition of the Thousand which brought down the semi-feudal regime of Sicily and Naples in 1860 and contributed decisively to Italian unification.

Gorter, Herman (1864–1927): Dutch poet, main representative of the Socialist (and later Communist) left in the Netherlands before and after World War I.

Gray, John (1798–1850): Disciple of Robert Owen, an advocate of money based on silver.

Greulich, Herman (1842–1925): Founder and main leader of Swiss social democracy before World War I.

Guesde, Jules (1845–1922): Leader of the Marxist wing of the French Socialist Party; identified with the center-left of the Second International until his capitulation to social-patriotism in 1914.

Guizot, François (1787–1874): French politician, conservative prime minister on the eve of the revolution of 1848; as a historian, he used the concepts of "class" and "class struggle" in his *History of the English Revolution*.

Han dynasty: Chinese emperors from 202 B.C. to A.D. 221.

Hardy, Thomas (1752–1832): Working-class leader of the London Corresponding Society during the French Revolution (*see Chapter 6*).

Harrington, James (1611–1677): Ideologue of the bourgeoisie during the English Revolution of 1640–1660; advocated the republic, a written constitution, a bicameral system; influenced the authors of the Constitution of the United States in the eighteenth century. Author of the utopian *Oceana*.

Haymarket martyrs: Parsons, Spies, Engel, Fischer, and Lingg, anarchist leaders in Chicago who promoted the struggle for the eight-hour workday; they were falsely accused of having thrown a bomb which killed seven policemen in Haymarket Square, on May 4, 1886, during a rally that followed a strike of 400,000 workers. The first four were hanged; Lingg killed himself before the execution.

Hegel, Georg Wilhelm Friedrich (1770–1831): German philosopher, encyclopedic thinker on a par with Aristotle, Avicenna, and al-Bīrūnī, he exercised a decisive influence on Marx and Engels.

Heine, Heinrich (1797–1856): Radical German poet, exiled to Paris where he befriended Marx.

Heraclitus (540–475 B.C.): Greek philosopher of Asia Minor, the founder of dialectic thought.

Hesiod (flourished mid-eighth century B.C.): Ancient Greek poet, author of *Labors and Days*.

Hess, Moses (1812–1875): German utopian socialist ideologue; influenced Karl Marx, then supported Lassalle and became one of the forerunners of Zionism.

Hodgskin, Thomas (1787–1869): English economist; tried to defend a proletarian standpoint on the bases of Ricardo's economic theories.

Hussites: Christian religious movement founded by Jan Hus (1369–1415) in fifteenth-century Bohemia and declared heretic; one branch, the Taborites, established a commune based on collective ownership in the city of Tabor.

Ibn Khaldūn (1332–1406): Arab historian and philosopher, a precursor of historical materialism.

Iglesias, Pablo (1850–1925): Spanish typographical worker; founder and main leader of Spanish social democracy before World War I.

Jacobins: Political party of the radical petty bourgeoisie during the French Revolution; under Danton, Robespierre, and Saint Just, it gave impetus to a radical phase, until the Ninth of Thermidor (July 27, 1794), at which point the political counter-revolution gained the upper hand.

Jacqueries: Regional peasant revolts of the fourteenth century, particularly in France (1358), England (1381), and Flanders; the broader revolts of the Hussites (*see this entry*) and Peasants' War in Germany (1524–1525), led by Thomas Münzer, drew on the legacy of these earlier revolts.

Juárez, Benito (1806–1872): Main leader of the second Mexican revolution (*see* Reforma).

Justo, Juan (1865–1928): Leader of the Argentine Social Democratic Party before World War I.

Kant, Immanuel (1724–1804): German idealist philosopher.

Katayama, Sen (1859–1933): Founder of the Japanese Metalworkers' Union (1898), of the Marxist Socialist Party (1901) and, after World War I, of the Communist Party; identified with the left of the Second International.

Kautsky, Karl (1854–1938): Engels's executor, along with Eduard Bernstein; main theoretician of German social democracy and the Second International before World War I; identified with the center-left of the International, in which he was the main vulgarizer of Marxist theory.

Kung-sun Lung (320–250 B.C.): Chinese philosopher; one of the founders of dialectic thought in that country.

Labriola, Antonio (1843–1904): Main theoretician and vulgarizer of Marxism in Italy before World War I.

Lafargue, Paul (1842–1911): French Marxist theoretician of Caribbean ancestry; husband of Marx's daughter, Laura.

Lassalle, Ferdinand (1825–1864): Founder of the first German Workers Party in 1863; a gifted agitator but a weak theoretician; his party fused with the Marxist Workers Party at the Congress of Gotha (1875).

Lenin, V. I. (1870–1924): Russian revolutionary, leader of the Russian Social Democratic Labor Party, identified with the left of the Second International.

Levellers: A radical democratic movement of the English Revolution, led by John Lillburne; not present in Parliament, its program, the "Agreement of the People" (1647), advocated a democratic republic; it stood for economic measures on behalf of small farmers and craftsmen (*see* Diggers).

Liebknecht, Wilhelm (1826–1900): Founder, with Bebel, of the German Marxist Workers Party in 1869.

Luther, Martin (1483–1546): German theologian who launched the Reformation which gave rise to Protestantism, in 1517; its main offshoots are Lutheranism, which is prevalent mainly in Germany and Sweden, Calvinism, and Puritanism (*see* Calvin, John; Puritanism).

Luxemburg, Rosa (1870–1919): Polish and German revolutionary, a leader of the left of the Second International.

Mably, Gabriel (1709–1785): French philosopher and historian, a forerunner of the utopian socialists.

Marx, Eleanor (1855–1898): English revolutionary, daughter of Marx, helped organize the international Socialist congresses; a founder of the Socialist League (1885) and the mass-action-oriented Union of Gas Workers (1889).

Masaryk, Thomas (1850–1937): Political leader of the Czech bourgeoisie in the Austro-Hungarian Empire, then, after 1918, president of the Republic of Czechoslovakia; author of an attempt to refute Marxism published in 1898.

Mazdakeans: Manichaean religious movement, which conceived the world as dominated by the struggle between Good and Evil; flourished in Iran in the fifth and sixth centuries A.D.; tended toward collective ownership of wealth.

Meslier, Jean (1664–1733): French priest and utopian socialist writer, argued for a commonwealth in his *Testament*.

Michel, Louise (1830–1905): French member of the First International; participated in the Paris Commune and became one of the best known propagandists of the workers movement, in which she defended anarchism.

Mignet, François Auguste (1796–1884): Historian of the French Revolution.

Millerand, Alexandre (1859–1943): A leader of the French social democratic right; he joined the Waldeck bourgeois coalition government in 1898, triggering a debate in the Second International on "Millerandism"; later adhered to the bourgeois right and became an ultraconservative president of the Republic after World War I.

Montesquieu, Charles de (1689–1755): French Enlightenment author, one of the founders of modern historiography and bourgeois liberal political theory.

More, Thomas (1478–1535): English ideologue and politician; chancellor of King Henry VIII, who had him beheaded for his opposition to absolutism.

Morgan, Lewis (1818–1881): American anthropologist; his materialist research, notably *Ancient Society*, profoundly influenced Marx and Engels and inspired Engels's book, *The Origin of the Family, Private Property and the State*.

Münzer, Thomas (c. 1489–1525): Main leader of the German Peasants' War in 1525.

O'Connor, Feargus (1796–1855): Leader of the Chartists (*see Chapter 5*), son of the famous Irish nationalist leader.

Owen, Robert (1771–1858): One of the great English utopian socialist thinkers, founder of the cooperative movement (*see Chapter 5*).

Paine, Thomas (1737–1809): Anglo-American ideologue and pamphleteer, one of the main theoreticians of petty-bourgeois radicalism in the late eighteenth century; his main work was entitled *The Rights of Man*.

Palacios, Alfredo (1880–1966): One of the main leaders of Argentine social democracy before World War I.

Petty, William (1623–1687): English founder of modern political economy; enunciator of the labor theory of value.

Plato (428–348 B.C.): One of the great ancient Greek philosophers, he was Aristotle's teacher and wrote the first sketch of an ideal utopian state, *The Republic*.

Plekhanov, George (1857–1918): For over a quarter century, the main vulgarizer of Marxism and founder of the Marxist movement in Russia; he drafted the program of the Russian Social Democratic Labor Party with Lenin but began moving to the right after the Russian Revolution of 1905, a drift which accelerated sharply after the outbreak of World War I.

Proudhon, Pierre-Joseph (1809–1865): French utopian socialist, a precursor of anarchism; his followers were influential in France between 1848 and 1871, including inside the Paris Commune.

Pugachov, Yemelyan (1726–1775): Cossack leader of a large-scale peasant revolt in Russia in the eighteenth century.

Puritanism: Anti-hierarchical current of the Protestant Reformation (*see* Luther, Martin) which was influential in England in the seventeenth century; it had a big impact on the English Revolution of 1640–1688,

and subsequently, on the evolution of religious ideas in all Anglo-American countries.

Quesnay, François (1694–1774): French physician and economist, a founder of the Physiocrats' school of political economy (*see Chapter 3*); presumed creator of the concept of "social class."

Ravestone, Piercy (c. 1780–1830): English economist who tried to criticize bourgeois society from the standpoint of Ricardo's economic principles.

Reforma: Name of the second Mexican revolution led by Benito Juárez from 1857 to 1867; it targeted mainly the oligarchy and church wealth.

Restoration: France's regime 1815–1830 (*see* Bourbons).

Ricardo, David (1772–1823): The greatest English classical economist, a supporter of the labor theory of value; profoundly influenced Karl Marx.

Rousseau, Jean-Jacques (1712–1778): Great ideologue of petty-bourgeois radicalism during the Enlightenment (*see this entry*); born in Geneva, he was one of the forerunners of modern historiography and sociology.

Saint-Simon, Claude Henri de (1760–1825): French philosopher and writer, one of the main utopian socialists.

Sansculottes: The craftsmen, apprentices, fishwives, and other toilers who made up the city people and constituted the urban base of the radical democratic current during the French Revolution of 1789 (*see Bras nus*; Jacobins).

Schapper, Karl (1812–1870): Leader of the League of the Just, then of the Communist League, along with the workers Joseph Moll and Heinrich Bauer (*see Chapter 5*).

Schiller, Friedrich (1759–1805): The main classical German writer, along with Goethe, but more radical than the latter in history and politics.

Sepoys: Soldiers of the Indian army who triggered a revolt against British colonial rule in 1857–1858.

Shelley, Percy Bysshe (1792–1822): English poet, one of the greatest revolutionary poets of all time.

Smith, Adam (1723–1790): Scottish economist; one of the founders of the classical school of political economy.

Spartacus (d. 71 B.C.): Roman slave of Greek origin (from the province of Thrace) who led up to 70,000 slaves in a great revolt in 73–71 B.C.

Spinoza, Baruch (1632–1677): Judeo-Dutch philosopher, founder with Descartes of modern naturalist philosophy, a precursor of materialism; also one of the founders of modern political science and one of the greatest thinkers of all time, on a par with Aristotle, Avicenna, al-Bīrūnī, and Hegel.

Stauning, Thorvald (1873–1942): Founder and main leader of Danish social democracy before and after World War I; identified with the right of the Second International; several times a minister in the cabinets of Denmark.

Tai Chen (Tai Tung-yüan) (1724–1777): Great Chinese philosopher, a dialectician who came close to materialism.

Taiping: Chinese revolutionary movement of a populist and peasant nature, inspired by a heretic Chinese Christian sect, between 1851 and 1864; Marx considered it the embryo of a Jacobin-led bourgeois revolution.

Tang dynasty: Chinese emperors from A.D. 618 to 907.

Thermidor: July 27, 1794, decisive conservative turning point of the French Revolution (*see* Consulate; Jacobins).

Thierry, Augustin (1795–1856): French historian, author of the *History of the Conquest of England by the Normans*.

Thiers, Louis-Adolphe (1797–1877): French historian and bourgeois politician, author of a *History of the French Revolution* and of a *History of the Consulate and Empire*; he led the counter-revolution during the bloody repression of the Paris Commune.

Thucydides (465–388 B.C.): The greatest historian of antiquity, born in Athens.

Tokugawa: Family of the Japanese feudal nobility which seized the shogunate (the day-to-day government under the nominal authority of the emperor) in 1603 and ruled until 1867, that is, until the Meiji Revolution.

Tone, Theobald Wolfe (1763–1798): Irish revolutionary leader, head of the Free Irishmen, influenced by the French Jacobins.

Toussaint-Louverture (1743–1803): Leader of the revolt of the slaves of Santo Domingo (Haiti), and of the "Black Jacobins."

Tristan, Flora (1803–1844): Franco-Peruvian radical feminist and utopian socialist; her writings influenced Marx and Engels.

Troelstra, Pieter Jelles (1860–1930): Founder and leader of the Social Democratic Workers Party of the Netherlands before and after World War I; identified first with the center, then, after 1919, with the right of the Second International.

Trotsky, Leon (1879–1940): Russian revolutionary, identified with the left of the Second International.

Tupac Amarú (1742?–1781): Leader of a revolt of the Peruvian Indians (1780–1783) against feudal exploitation and Spanish colonialism.

Turgot, Anne-Robert-Jacques (1727–1781): French economist of the Physiocrats' school; attempted to introduce reforms when finance minister of the French monarchy (1774–1776).

Turner, Nat (1800–1831): Leader of the revolt of the black slaves of Southampton in 1831, the main such revolt in the southern United States in the nineteenth century before the Civil War.

Vandervelde, Émile (1866–1938): Founder and main leader of the social democratic Belgian Workers Party; he was the president of the Second International in which he identified with the center-left before World War I, and with the center-right after his capitulation to social-patriotism in 1914.

Voltaire (François-Marie Arouet, known as) (1694–1778): French writer, philosopher, and historian of the Enlightenment (*see this entry*), main revolutionary ideologue of the bourgeoisie; less radical than Rousseau.

Weitling, Wilhelm (1808–1871): One of the first German communists of working-class origin; a leading utopian socialist (*see Chapter* 7).

Wordsworth, William (1770–1850): English romantic poet.

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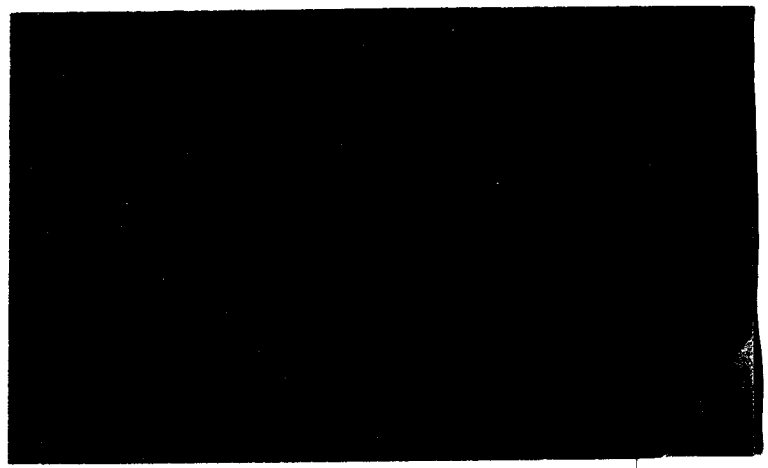

The Place of Marxism in History

At a time when many repentant leftists are proclaiming Marxism incapable of explaining the new phenomena of this last quarter of the twentieth century, Ernest Mandel reminds us in *The Place of Marxism in History* that Marxism drew from its very inception on the advances of all the social sciences and emancipation movements of its time. In a survey of the multiple sources of Marx and Engels' theory, he identifies the specific contribution of the two friends in the various disciplines to which they applied themselves: philosophy, political economy, social history, revolutionary organization, self-organization of the working class, emancipation movements, internationalism. Concluding that Marxism "constantly learns from perpetually changing reality" and that it is the conscious expression of the real movement of workers toward self-emancipation, Mandel proposes a formula which provides for a dialectical interaction between innovation and the verification of established tenets.

This text is based on a series of lectures given at the International Institute for Research and Education.

Ernest Mandel, Professor Emeritus at the Free University of Brussels, is widely acknowledged as the foremost Marxist economist of our time. He was active in the revolutionary socialist movement in the late 1930s and participated in the struggle against the Nazi occupation of Belgium. He was editor of *La Gauche,* a member of the economic studies commission of the General Confederation of Labor of Belgium, and occupied leading positions in the Socialist Workers Party and the Fourth International.

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