

## Chapter 5

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# Marxism

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In the mid-1840s Marx and Engels wrote that capitalist globalization was seriously eroding the foundations of the international system of states. Conflict and competition between nation-states had not yet ended in their view but the main fault-lines in future looked certain to revolve around the two principal social classes: the national bourgeoisie, which controlled different systems of government, and an increasingly cosmopolitan proletariat. The outline of a radically new social experiment was already contained within the most advanced political movements of the industrial working class. Through revolutionary action, the international proletariat would embed the Enlightenment ideals of liberty, equality and fraternity in an entirely new world order which would free all human beings from exploitation and domination (Marx and Engels 1977).

Many traditional theorists of international relations have pointed to the failures of Marxism or 'historical materialism' as an account of world history. Marxism has been the foil for their argument that international politics have long revolved around competition and conflict between independent political communities, and will do so well into the future. Realists such as Kenneth Waltz claimed that Marxism was a 'second-image' account of international relations which believed that the rise of socialist as opposed to capitalist *regimes* would eliminate conflict between states. Its utopian aspirations were bound to be dashed because the struggle for power and security is an inescapable consequence of international anarchy which only 'third-image' analysis can explain (Waltz 1979). English School thinkers such as Martin Wight maintained that Lenin's *Imperialism: The Highest Stage of Capitalism* (1916) might seem to be a study of international politics but it was far too preoccupied with the economic aspects of human affairs to be taken seriously as a contribution to the field (Wight 1966). Marxists had underestimated the crucial importance of nationalism, the state and war, and the significance of the balance of power, international law and diplomacy for the structure of world politics.

New interpretations of Marxism have appeared since the 1980s: the perspective has been an important weapon in the critique of realism and there have been many innovative attempts to use its ideas to develop a more historically aware conception of the development of modern international relations (Cox 1981, 1983; Gill 1993a; Halliday 1994; Rosenberg 1994; Teschke 2003). Its impact on the critical theory of international relations has been immense. It has also been an important resource in the area of international political economy, where scholars have analysed the interplay between states and markets, the states-system and the capitalist world economy, the spheres of power and production. For some, the collapse of the Soviet Union and the triumph of capitalism over socialism marked the death of Marxism as social theory and political practice. In the 1990s, some argued that the relevance of Marxism had increased with the passing of the age of bipolarity and the rapid emergence of a new phase of economic globalization (Gamble 1999). A biography of Marx which appeared in the late 1990s argued that, following the collapse of the Soviet Union, his analysis of how capitalism breaks down Chinese Walls and unifies the human race had finally come of age (When 1999). For others, the resurgence of national security politics since the terrorist attacks of '9/11' is a simple reminder that Marxism has little grip on the most fundamental realities of international politics. Assessing these different evaluations of Marx's writings and the contributions of Marxism is the central purpose of this chapter.

It was unwise to claim too much for Marxism in the 1990s, notwithstanding considerable prescience about how capitalism was becoming the dominant form of production across the world. This was not only because Marxism took the view that the triumph of capitalism would be short-lived and that its inexorable laws would lead to its destruction and eventual replacement by Communism. Nor is it just because Marxism had a poor grasp of the importance of the nation-state and violence in the modern world, a point that Marxists conceded in the 1970s and 1980s (see Giddens 1985). It is also because modern forms of globalization have been accompanied by renewed ethnic violence and national fragmentation which Marx and Engels, insightful though they were about the march of capitalist globalization and growing economic inequalities, could not have foreseen. Other Marxist writers saw things differently. Lenin, for example, believed that capitalism caused national fragmentation as well as unprecedented advances in globalization, but that does not necessarily mean that Marxism offers the best explanation of how globalization and fragmentation have unfolded in tandem in modern times and especially since the collapse of the Soviet Union.

An evaluation of Marxism can scarcely avoid the conclusion that its exponents were too preoccupied with production and class conflict to

grasp the peculiarities of the modern age or to develop an adequate critical theory of the modern world. But it might nevertheless be found that Marxist analyses of capitalist globalization and fragmentation invite reconsideration of Waltz and Wight's argument that Marxism may not be regarded as a serious contribution to the study of international politics or is clearly inferior to conventional approaches in the field. It might also be argued that its project of developing a critical theory of world society is one respect in which Marxism supersedes the dominant approaches in the Anglo-American study of international politics. If so, the question is how to build on its foundations, how to preserve its strengths and how to move beyond its errors and weaknesses. This was the task that the early members of the Frankfurt School set themselves. Frankfurt School thinkers such as Horkheimer maintained in the 1930s that the challenge was to preserve the 'spirit' while departing from the 'letter' of classical Marxism (Friedman 1981: 35–6). Working within the same tradition, Habermas argued in the 1970s that the key task was to bring about the 'reconstruction of historical materialism' (Linklater 1990b; see also Chapter 6 in this volume).

The first section of this chapter describes the main features of historical materialism and explains how international relations fitted within that framework and the second summarizes key themes in the Marxist analysis of nationalism and imperialism. A brief overview of the orthodox critique of Marxism within International Relations comes next and of its rehabilitation in the 1980s when political economy and critical theory came to the fore. The final section evaluates the Marxist tradition in the light of recent developments in the theory of international relations.

### **Class, production and international relations in Marx's writings**

For Marx, human history has been a laborious struggle to satisfy basic material needs, to understand and tame the physical world, to resist class domination and exploitation and to overcome fear and distrust of the rest of the human race. The main achievements of human history have included the gradual conquest of hostile natural forces which were once beyond human control and understanding, the steady elimination of ignorance and superstition, the growing capacity to abolish crippling material scarcity and exploitation and the potential for remaking society so that all human beings can develop a range of creative powers which are unique to their species. But modern history shaped by capitalism had unfolded tragically in Marx's view. The power of society over nature had expanded to an unprecedented degree but individuals had become

trapped within an international social division of labour, exposed to unfettered market forces and exploited by new forms of factory production which turned workers into appendages to the machine (Marx 1977a: 477). Marx thought that capitalism had made massive advances in reducing feelings of estrangement between societies. Nationalism, he believed, had no place in the hearts and minds of the most advanced sections of the proletariat which were committed to a cosmopolitan political project. But capitalism was a system of largely unchecked exploitation in which the bourgeoisie controlled the labour-power of members of the proletariat and profited from their work. It was the root cause of an alienating condition in which the human race – the bourgeoisie as well as the proletariat – was at the mercy of structures and forces which it had created. Marx wrote that philosophers had only interpreted the world whereas the real point was to change it (Marx 1977b: 158). An end to alienation, exploitation and estrangement was Marx's main political aspiration and the point of his efforts to understand the laws of capitalism and the broad movement of human history. This was his chief legacy to thinkers in the Marxist tradition.

Marx believed that the historical import of the forces of production (technology) and the relations of production (and especially the division between those who own the means of production and those who must work for them to survive) had been neglected by the Hegelian movement with which he was closely associated in his formative intellectual years. Hegel had focused on the many forms of religious, philosophical, artistic, historical and political thinking – the diverse types of self-consciousness – which the human race had passed through in its long journey of coming to know itself. After his death, and as part of the struggle over Hegel's legacy, the Left Hegelians attacked religion, believing it was a form of 'false consciousness' which prevented human beings from acquiring a deep understanding of what they are and what they can become. But, for Marx, religious belief was not an intellectual error which had to be corrected by philosophical analysis but an expression of the frustrations and aspirations of people struggling with the material conditions of everyday life. Religion was 'the opium of the masses' and the 'sigh of an oppressed creature' (Marx 1977c: 64) and revolutionaries had to understand and challenge the social conditions which gave rise to the solace of religious beliefs. 'The critique of heaven', as Marx put it, had to become 'the critique of earth' (1977c).

The pivotal theme in Marx's materialist conception of history is that individuals must first satisfy their most basic physical or material needs before they can do anything else. In practice, this has meant the mass of humanity, in order to survive, has had to surrender control of its labour power to those that own the instruments of production. Given the basic

reality of property relations, the dominant classes throughout history have been able to exploit the subordinate classes but this had always led to class conflict. Indeed, Marx believed that class struggle had been the principal form of conflict in the whole of human history. Political revolution had been the main agent of historical development while technological innovation had been the driving-force behind social change.

Marx wrote that history was the continuous transformation of human nature (Marx 1977d: 105). Put differently, human beings do not only modify nature by working on it; they also change themselves and develop new hopes and needs. The history of the development of the human species could be understood only by tracing the development of the dominant modes of production which, in the West, included primitive communism, slave societies, feudalism and capitalism which would soon be replaced by socialism on an international scale. The fact that Marx thought socialism would be a global rather than a European phenomenon deserves further comment. Whereas war, imperialism and commerce had simply destroyed the isolation of earlier human societies, capitalism directed all sections of the human race into a single historical stream. Few mainstream students of International Relations recognized the importance of this preoccupation with the economic and technological unification of the human species, with the widening of the boundaries of social cooperation and with the forces that blocked advances in human solidarity (Gill 1993a). Few traditional scholars commented on his fascination with the relationship between internationalization and internationalism, but these are crucial themes in his writings which contain much that should interest the student of contemporary international affairs (Halliday 1988a).

In his reflections on capitalism, Marx argued that universal history came into being when the social relations of production and exchange became global and when more cosmopolitan tastes emerged, as illustrated by the desire to consume the products of distant societies and to enjoy an increasingly 'world literature'. But the forces which unified humanity also checked the growth of universal solidarity by pitting members of the bourgeoisie against the proletariat (and against each other), and by forcing members of the working class to compete for scarce employment. Yet the very tension between the wealth generated by capitalism and the poverty of many individual lives generated new forms of solidarity among the exploited classes. International working class solidarity was also triggered by the remarkable way in which capitalist societies used the language of freedom and equality to justify existing social relations, while systematically denying real freedom and equality to the poorer classes.

Large normative claims are raised by the question of what it means to be truly free and equal. In general, Marx and his collaborator, Engels,

were dismissive of the study of ethics, but they were hardly engaged in the dispassionate analysis of nineteenth-century industrial capitalism (even though they did believe it was possible to develop a science of the laws of capitalist development modelled on the physical sciences). There is no doubt their inquiry into capitalism was normative through and through (Lukes 1985; Brown 1992). Indeed, Marx's own purpose was made clear in the introductory remarks to *The Eighteenth Brumaire of Louis Bonaparte*, where he wrote that human beings make their own history but not under conditions of their own choosing (Marx 1977e: 300). His point was that humans make their own history because they possess the power of self-determination which other species either do not have or cannot exercise to the same degree. And yet humans cannot make history as they please because class structures stand over them and greatly constrain their freedom of action. A distinctive political project is already contained within this observation, namely how human beings can come to make more of their history under conditions freely chosen by themselves.

Although Marx rejected Hegel's study of history and politics, he kept faith with one of Hegel's most central themes which is that in the course of their history human beings acquire a deeper appreciation of what it means to be free and a better understanding of why society will have to be changed before freedom can be realized more completely. In line with his belief that history revolves around the labour process, Marx observed that freedom and equality under capitalism mean that bourgeois and proletarian enter into a labour contract as legal equals, but massive social inequalities place workers at the mercy of the bourgeoisie and reduce their freedom and equality. He took the view that proletarian organizations were developing an understanding of how socialism could make good the claims to freedom and equality which were already present in capitalist societies. Marx's passionate condemnation of capitalism has to be seen in this light. It is a critique from inside the capitalist order rather than a challenge from outside which appeals to some notion of a higher morality.

Marx rejected the ethical standpoint, which one finds in Kant's writings, that human beings can agree on universal truths by using reason, but he shared Kant's conviction that all political efforts to realize freedom within the sovereign state were ultimately futile because they could be rapidly destroyed by the sudden shock of external events. For Kant, war was the dominant threat to the creation of the perfect society; hence his belief in the priority of working for perpetual peace. For Marx, global capitalist crisis was the recurrent danger. Consequently, the idea of 'socialism in one country' was irrelevant in his view in the context of capitalist globalization. Human freedom could be achieved only through