CHAPTER 3

Engines of Change—Karl Marx (German, 1818–1883)
A knowledge of the writings of Marx and Engels is virtually indispensable to an educated person in our time. . . . For classical Marxism . . . has profoundly affected ideas about history, society, economics, ideology, culture, and politics; indeed, about the nature of social inquiry itself. . . . Not to be well grounded in the writings of Marx and Engels is to be insufficiently attuned to modern thought, and self-excluded to a degree from the continuing debate by which most contemporary societies live insofar as their members are free and able to discuss the vital issues. (Tucker, 1978, p. ix)

Karl Marx forms the foundation for much sociological as well as social thinking (even for people unaware of his influence). Marx is the one that gave us the initial insight to see patterns of conflict evolving and revolving around systems of inequality. So, anytime we notice, understand, and care about inequalities, we are seeing the world like Marx did. Marx also taught us to pay attention to the economy and the state and how the elite in those institutions use power and ideology. If we see class as an important determinant in life, then we are thinking like Marx. If we think that the government and other social institutions may actually be used by the upper class to facilitate inequality, then we are thinking like Marx. If we feel that some of the things that people believe may in the long run keep them oppressed or prevent them from reaching their full potential, then we are thinking like Marx.

More than his influence on social thinking in general, Marx has been a dominant figure that theorists have either argued against, like Weber, or used in unique ways to understand society and the way inequality works. One such school of thought is the Frankfurt School, the birthplace of critical theory. We’ve been talking about the Enlightenment, positivism, and the idea of progress. Marx’s theory generally falls under this perspective. Marx feels that history and society can and should be studied scientifically, and he is decidedly an empiricist. He argues that societies change and history moves forward in response to dialectic structural forces in the economy; thus, for Marx, society functions much like a machine, according to law-like principles that can be

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History itself is a real part of natural history—of nature’s coming to be man. Natural science will in time subsume under itself the science of man, just as the science of man will subsume under itself natural science: there will be one science. (Marx, 1932/1978a, pp. 90–91)
discovered and used. Most importantly for our present discussion, Marx posits that human consciousness is materially based as well. He argues that consciousness is directly related to economic, material production; thus he argues against idealism, religion, and most philosophy. While Marx is critical of society, he also holds that a scientific approach is the path to true knowledge that would liberate the oppressed.

The Frankfurt School, formed in 1922 at the University of Frankfurt in Germany, inverts Marx’s emphasis on the empirical world and science. The events in Germany during the 1920s and 1930s created an intellectual atmosphere where the state’s use of ideology apart from class relations became an important focus of research. Nationalism—pride in one’s national identity at any cost—took root in prewar Germany and came to fruition under the Nazis. As a result of not only WWII but also WWI, the burning question for many social and behavioral scientists became, how is it possible for people to believe in such a destructive national ideology?

Some of the answers, such as those from Erich Fromm, focused on psychological issues. Others, such as the Frankfurt School, focused on the social production of knowledge and its relationship to human consciousness. This kind of Marxism focuses on Marx’s Hegelian roots. We will talk more about Georg Wilhelm Hegel in a bit, but for now the salient point is that this refocus on Hegel produced a major shift from material explanations of consciousness to idealistic and cultural ones. Thus, like Marx, the Frankfurt School focuses on ideology; but, unlike Marx, critical theory sees ideological production as linked to culture and knowledge rather than class and material relations of production. Ideology, then, is more broadly based and insidious than Marx supposed.

Max Horkheimer became the director of the Frankfurt School in 1930 and continued in that position until 1958. Horkheimer criticized the contemporary Western belief that positivistic science was the instrument that would bring about necessary changes, positing instead that the questions that occupy the social sciences simply reflect and reinforce the existing social and political order. Horkheimer believed that the kind of instrumental reasoning or rationality that is associated with science is oriented only toward control and exploitation, whether the subject is the atom or human beings. Science is thus intrinsically oppressive, and a different kind of perspective is needed to create knowledge about people.

Jürgen Habermas, the current director since 1963, picked up Horkheimer’s theme and argues that there are three kinds of knowledge and interests: empirical, analytic knowledge that is interested in the technical control of the environment (science); hermeneutic or interpretive knowledge that is interested in understanding one another and working together; and critical knowledge that is interested in emancipation. Because scientific knowledge seeks to explain the dynamic processes found within a given phenomenon, science is historically bound. That is, it only sees things as they exist. That being the case, scientific knowledge of human institutions and behaviors can only describe and thus reinforce existing political arrangements (since society is taken “as is”). As such, science in sociology is ideological. Critical knowledge, on the other hand, situates itself outside the historical normative social relations and thus isn’t susceptible to the same limitations as science. Thus, science is limited, and truly important social questions must be addressed from outside the historical confines of present-day experience. The intent of critical knowledge is to get rid of the distortions, misrepresentations, and political values found in our
knowledge and speech. Critical theory is based in praxis and sees an inseparable relationship between knowledge and interests.

Antonio Gramsci (1928/1971) gives us another important cultural extension of Marx. For Gramsci, the condition of the West is past the point where the materially based Marxist revolution can occur. Revolution for Gramsci is not the simple product of external economic forces as in Marx, but revolutions come out of and are preceded by intense cultural work. This cultural work is based upon critical knowledge. Marx implies, and Gramsci makes specific, that the only way to truly see the whole social system and its problems is to stand outside of it. So, in order to understand the capitalist system with its ideology you must be outside of it and grasp it as a whole. This obviously presents a problem for the elite: the system is created by and works for the benefit of the capitalist ruling class. Standing outside the system is particularly difficult for capitalists. Workers, on the other hand, while subject to the ideology of the system, are also by definition outside of it. The working class by its very position of alienation is capable of seeing the true whole, the knowledge of class relations from the standpoint of the entire society and its system of production and social relations.

Another school of Marxist thought that is particularly noteworthy is world systems theory, initiated by Immanuel Wallerstein. According to Wallerstein (1974/1980), individual states are currently linked together in a world economic system. There are four types of states in this world economy: the core, which contains the great military and economic powers of the day; the semi-periphery—states that are between the core and the periphery in terms of economic and military power; the periphery, which is the colonial or undeveloped countries; and the external areas available for conquest. The periphery is the core’s exploited labor force, thus living conditions are poor and labor is forced. The core, as a result of having the periphery to exploit, enjoys light taxation, relatively free labor, and a high standard of living. The key to the world economic system is the presence of external areas to exploit. When there are no more external areas, world capitalism will dominate. And once that happens, the internal contradictions of capitalism will play themselves out and the end result will be a world socialist government. Thus, rather than emphasizing the critical consciousness that is implicit in Marx, as does the Frankfurt School, world systems theory simply lifts the empirical class dynamics out from the national level and situates them globally.

I won’t spend this much time talking about the contemporary influences of all of our theorists. I’ve gone into a bit of detail with Marx because I think it is important for us to see that Marx’s influence is stronger today than it has ever been. Above I talked about two main paths through which Marxism has come to us today: critical and world systems theory. These two paths have, in turn, informed countless other contemporary perspectives and theories. Among them are feminist standpoint theory; critical race theory; globalization studies; the Birmingham School of Cultural Studies; literary criticism; the postmodern theories of Douglas Kellner, Ben Agger, Fredric Jameson, and others; critical media studies; and the list goes on. Of course, this is one of the defining features of a classic: it continues to influence contemporary thought. However, I would hazard a guess that Marx’s thought has specifically influenced our social, political, and sociological thinking more than any other thinker in this book.
I end this introduction with a quote from Friedrich Engels (1978b), spoken at Marx’s graveside.

On the 14th of March, at a quarter to three in the afternoon, the greatest living thinker ceased to think. He had been left alone for scarcely two minutes, and when we came back we found him in his armchair, peacefully gone to sleep—but for ever.

An immeasurable loss has been sustained. . . . The gap that has been left by the departure of this mighty spirit will soon enough make itself felt.

Just as Darwin discovered the law of development of organic nature, so Marx discovered the law of development of human history: the simple fact, hitherto concealed by an overgrowth of ideology, that mankind must first of all eat, drink, have shelter and clothing, before it can pursue politics, science, art, religion, etc.; that therefore the production of the immediate material means, and consequently the degree of economic development attained by a given people or during a given epoch, form the foundation upon which the state institutions, the legal conceptions, art, and even the ideas on religion, of the people concerned have been evolved, and in the light of which they must, therefore, be explained, instead of vice versa, as had hitherto been the case.

But that is not all. Marx also discovered the special law of motion governing the present-day capitalist mode of production, and the bourgeois society that this mode of production has created . . .

Such was the man of science. But this was not even half the man. Science was for Marx a historically dynamic, revolutionary force . . .

For Marx was before all else a revolutionist. His real mission in life was to contribute, in one way or another, to the overthrow of capitalist society and of the state institutions which it had brought into being, to contribute to the liberation of the modern proletariat, which he was the first to make conscious of its own position and its needs, conscious of the conditions of its emancipation. Fighting was his element. And he fought with a passion, a tenacity and a success such as few could rival . . .

And, consequently, Marx was the best hated and most calumniated man of his time. Governments, both absolutist and republican, deported him from their territories. Bourgeois, whether conservative or ultra-democratic, vied with one another in heaping slanders upon him. All this he brushed aside as though it were a cobweb, ignoring it, answering only when extreme necessity compelled him. And he died beloved, revered and mourned by millions of revolutionary fellow workers—from the mines of Siberia to California, in all parts of Europe and America—and I make bold to say that, though he may have had many opponents, he had hardly one personal enemy.

His name will endure through the ages, and so also will his work. (p. 681)
Marx in Review

- Born on May 5, 1818, in Trier, one of the oldest cities in Germany, to Heinrich and Henrietta Marx. Both parents came from a long line of rabbis. His father was the first in his family to receive a secular education (he could recite numerous passages from Enlightenment thinkers)—Heinrich was a lawyer who allowed himself to be baptized Protestant in order to avoid anti-Semitism; a move that was not entirely successful.

- At seventeen, Karl Marx enrolled in the University of Bonn to study law. It was there that he came in contact with and joined the Young Hegelians, who were critical of Prussian society (specifically, because it contained poverty, government censorship, and religious discrimination). The Young Hegelians were particularly critical of the Prussian state’s use of religious legitimation. Bonn was also a party school and young Marx spent a good deal of his time in beer halls. His father thus moved him to a more academically oriented university (Friedrich-Wilhelms-Universität in Berlin) where, much to his father’s chagrin, Marx’s interests turned to philosophy. Because of his political affiliations, Marx was denied a university position by the government. Marx turned to writing and editing, but had to battle government censorship continually.

- In 1843, Marx moved to Paris with his new wife, Jenny von Westphalen. In Paris, he read the works of reformist thinkers who had been suppressed in Germany and began his association with Friedrich Engels. During his time in Paris, Marx wrote several documents that were intended for self clarification (they were never published in his lifetime) but have since become important Marxian texts (Economic and Philosophic Manuscripts of 1844 and The German Ideology, which was finished in Brussels).

- Over the next several years, Marx moved from Brussels, back to Paris, and then to Germany. Much of his movement was associated with revolutions that broke out in Paris and Germany in 1848. That year also marks the publication of The Communist Manifesto. Finally, in 1849, Marx moved to London, where he remained. He spent the early years of the 1850s writing several historical and political pamphlets.

- In 1852, Marx began his studies at the British Museum. There he would sit daily from 10 AM to 7 PM, studying the reports of factory inspectors and other documents that described the abuses of early capitalism. This research formed the basis of Das Kapital, his largest work. During this time, three of his children died of malnutrition.

- The workers’ movements were quiet after 1848, until the founding of the First International. Founded by French and British labor leaders at the opening of the London Exhibition of Modern Industry, the union soon had members from most industrialized countries. Its goal was to replace capitalism with collective ownership. Marx spent the next decade of his life working with the International. The movement continued to gain strength worldwide until the Paris Commune of 1871. The Commune was the first
The nucleus of Marx's thought contains two issues, both of which come from the world of philosophy. Three interrelated questions have dominated philosophy since its beginning, some 2500 years ago: What is reality? How do we know what we know? And, how are humans uniquely aware of their world and themselves? The first question asks what kinds of things exist and that field of study is called ontology (the study of being or existence). The second question asks how knowledge is created and its field of study is called epistemology (the study of knowledge). The third issue looks at how people are aware of themselves and their surroundings; it is simply referred to as the philosophy of consciousness.

Species-being: Marx actually builds his sociology from his answers to these questions. Let's consider the issues of consciousness and knowledge first. It seems humans are aware in a way that other animals are not. First, we are not simply aware of the environment; we are also conscious of our own awareness of it. And second, we can be conscious of our own existence and give it meaning. There are many philosophical and some sociological speculations about how this came about. Marx proposes a rather unique answer to the problem of human consciousness: *species-being*.

Marx argues that the unique thing about being human is that we create our world. All other animals live in a kind of symbiotic relationship with the physical environment that surrounds them. Zebras feed on the grass and lions feed on the zebras, and in the end the grass feeds on both the zebras and the lions. The world of the lion, zebra, and grass is a naturally occurring world, but not so for the human world. Humans must create a world in which to live. They must in effect alter or destroy the natural setting and construct something new. The human survival mechanism is the ability to change the environment in a creative fashion in order to produce the necessities of life. Thus, when humans plow a field or build a skyscraper, there is something new in the environment that in turn acts as a mirror through which humans can come to see their own nature. Self-consciousness as a species that is distinct from all others comes as the human being observes the created human world. There is, then, an intimate connection between producer and product: *the very existence of the product defines the nature of the producer*.

By means of it [species-being] nature appears as his work and his reality. The object of labor is, therefore, the *objectification of man’s species life; for he no longer reproduces himself merely intellectually, as in consciousness, but actively and in a real sense, and he sees his own reflection in a world which he has constructed.*

(Marx, 1932/1995, p. 102)
Here's an illustration to help us think about this: Have you ever made anything by hand, like clothing or a woodworking project, or perhaps built a car from the ground up? Remember how important that thing was to you? It was more meaningful than something you buy at the store simply because you had made it. You had invested a piece of yourself in it; it was a reflection of you in a way that a purchased commodity could never be. But this is a poor illustration because it falls short of what Marx truly has in mind. Marx implies that human beings in their natural state lived in a kind of immediate consciousness. Initially, human beings created everything in their world by hand. There weren't supermarkets or malls. If they had a tool or a shirt, they had made it or they knew the person who did. Their entire world was intimately connected. They saw themselves purely in every product. Or, if they had bartered for something, then they saw an immediate social relationship with the person who had made the thing. When they looked into the world they had produced, they saw themselves, they saw a clear picture of themselves as being human (creative producers), and they also saw intimate and immediate social relations with other people. The world that surrounded them was immediately and intimately human. They created and controlled and understood themselves through the world that they had made.

Notice a very important implication of Marx's species-being: human beings by their nature are social and altruistic. Marx's vision of human is based on the importance of society in our species survival. We survive collectively and individually because of society. Through society we create what is needed for survival; if it were not for society, the human animal would become extinct. We are not equipped to survive in any other manner. What this means, of course, is that we have a social nature—we are not individuals by nature. Species-being also implies that we are altruistic. Altruism is defined as uncalculated commitment to others' interests. Not only are we not individualistic by nature, we are not naturally selfish. If human survival is based on collective cooperation, then it would stand to reason that our most natural inclination would be to serve the group and not the self. The idea of species-being is why Marx believes in communism—it's the closest economic system to our nature state. Further, Marx would argue that, under conditions of modernity/capitalism, we don't see these attributes in humans because we exist under compromising structures. It is capitalism that teaches us to be self-centered and self-serving. This effect of capitalistic structures is why Marx argues that society will go through a transition stage of socialism on its way from capitalism to communism.

Marx's theory of species-being also has implications for knowledge and consciousness. In the primitive society that we've been talking about, humans' knowledge about the world was objective and real; they held ideas that were in perfect harmony with their own nature. According to Marx, human ideas and thought come about in the moment of solving the problem of survival. Humans survive because we creatively produce, and our clearest and most true ideas are grounded in this creative act. In species-being, people become truly conscious of themselves and their ideas. Material production, then, is supposed to be the conduit through which human nature is expressed, and the product ought to act as a mirror that reflects back our own nature.
Let’s try an analogy to get at this extremely important issue. There are a limited number of ways you can know how you physically look (video, pictures, portraits, mirrors, and so forth). The function of each of these methods is to represent or reproduce our image with as little distortion as possible. But what if accurate representation was impossible? What if every medium changed your image in some way? We would have no true idea how we physically look. All of our ideas would be false in some way. We would think we see ourselves but we wouldn’t. Marx is making this kind of argument; but not about our physical appearance; he’s concerned with something much more important and fundamental—our nature as humans. We think we see it, but we don’t.

We need to take this analogy one step further: notice that with mirrors, pictures, and videos, there is a kind of correspondence between the representation and its reality. What I mean is that each of these media presents a visual image, and in the case of our physical appearance, that’s what we want. Imagine if you asked someone how you looked and the person played an audio cassette tape for you. That wouldn’t make any sense, would it? There would be no correspondence between the mode of representation and the initial presentation. This, too, is what Marx is telling us. If we want to know something about our human nature, if we want to see it represented to us, where should we look? What kind of medium would correspond to our nature? Marx is arguing that every species is defined by its method of survival or existence. Why are whales, lions, and hummingbirds all different? They are different because they have different ways of existing in the world. What makes human beings different from whales, lions, and hummingbirds? Humans have a different mode of existence. We creatively produce what we need—we make products, and we are the only species that does.

So, where should we look to understand our nature? What is the medium that corresponds to the question? If we want to know how we look physically, we look toward visual images. But if we want to know about our nature, we must look to production and everything associated with it. Thus, according to Marx, production is the vehicle through which we can know human nature. However, Marx says that there is something wrong with the medium. Under present conditions (capitalism), it gives a distorted picture of who and what we are.

If we understand this notion of species-being, then almost everything else Marx says falls into place. To understand species-being is to understand alienation (being cut off from our true nature), ideology (ideas not grounded in creative production), false consciousness (self-awareness that is grounded in anything other than creative production), and we can also understand why Marx placed such emphasis on the need for class consciousness in social change. This understanding of human nature is also why Marx is considered an economic determinist. The economy is the substructure from which all other structures (superstructure) of human existence come into being and have relevance. We will explore these ideas more later on, but for now let’s move on to the second part of the core of Marx’s thought—his consideration of reality/ontology.

Material dialectic: While ontology doesn’t become part of Marx’s sociology, as consciousness does, his ontological work results in the concept of the material dialectic,
or what is generally called dialectical materialism, which is essential for his theory. In Marx’s time, there were two important ways of understanding the issue of reality: idealism and materialism. Idealism posits that reality only exists in our idea of it. While there may indeed be a material world that exists in and of itself, that world exists for humans only as it appears. The world around us is perceived through the senses, but this sense data is structured by innate cognitive categories. Thus, what appears to humans is not the world itself but our idea of it.

On the other hand, materialism argues that all reality may be reduced to physical properties. In materialism, our ideas about the world are simple reflections; those ideas are structured by the innate physical characteristics of the universe. Marx feels that both of these extremes do not correctly consider humans as social animals. He proposes another way of understanding reality and consciousness; he terms this way of thinking naturalism, or humanism.

Marx rejects brute materialism out of hand, but he has to consider idealism more carefully. One of idealism’s strongest supporters, Georg Wilhelm Friedrich Hegel, died just four years prior to Marx enrolling at the University of Bonn, and at the time, Hegel still held a significant place in the thinking of German philosophers (in fact, Hegel is still a powerful figure in philosophy). Hegel was an idealist and argued that material objects (like a chair or a rock) truly and completely only exist in our concept of them. But Hegel took idealism to another level, using it to argue for the existence of God (the ultimate concept); he argued that the ideal took priority over the material world. According to Hegel, human history is a dialectical unfolding of the Truth that reality consists of ideas and that the material world is nothing more than shadow. This dialectical unfolding ends in the revelation of God.

A dialectic contains different elements that are naturally antagonistic to one another; Hegel called them the thesis and antithesis. The dialectic is like an argument or a dialog between elements that are locked together (The word dialectic comes from the Greek word dialektikos, meaning discourse or discussion.). For example, to understand “good,” you must at the same time understand “bad.” To comprehend one, you must understand the other: good and bad are locked in a continual dialog. Hegel argued that these kinds of conflicts would resolve themselves into a new element or synthesis, which in turn sets up a new dialectic: every synthesis contains a thesis that by definition has conflicting elements. Hegel’s ideational dialectic would look something like I have diagrammed in Figure 3.1.

Marx liked the historical process implied in Hegel’s dialectic, but he disagreed with its ideational base. Marx, as we have seen, argues that human beings are unique because they creatively produce materials to fill their own material needs. Since the defining feature of humanity is production, not ideas and concepts, then Hegel’s notion of idealism is false, and the dialectic is oriented around material production and not ideas—the material dialectic. Thus, the dynamics of the historical dialectic are to be found in the economic system, with each economic system inherently containing antagonistic elements (see Figure 3.2). As the antagonistic elements work themselves out, they form a new economic system.

Notice that the engine of progress according to the dialectic is conflict. For Hegel, ideas resolve themselves and humanity comes closer to the Truth because there is a natural antagonism within the idea itself. Marx of course sees this occurring in
material or social relations, so the way societies change and progress is through conflict—the engine of social change is dialectical conflict. Here we see a general point about the conflict/critical model of society, and of course another element in Marx's thinking.

We can think of this way of seeing society as an upheaval model. According to this perspective, society is not like an organism that gradually and peacefully becomes more complex in order to increase its survival chances, as in functionalism. Rather, society is filled with human beings who exercise power to oppress and coerce others. Periods of apparent peace are simply times when the powerful are able to dominate the populace in an efficient manner. But, according to this model, the suppressed will become enabled and will eventually overthrow and change the system. Social change, then, occurs episodically and through social upheaval.

There's an important point here: for Marx, revolution is unavoidable. It is certainly the case that Marx was critical about capitalism because of a personal point of view: he hated the abuses he saw. Remember, at that time governmental controls such as

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**Figure 3.1** Hegel's Dialectic

**Figure 3.2** Marx's Material Dialectic
OSHA did not exist and capitalists required their workers to work in abject conditions. But here we can also see a more logical, philosophical reason behind the critical point of view. If history is the result of structural forces locked in a dialectic, then it makes sense and is philosophically consistent to look at society using a conflict perspective.

In mapping out the past of the historical dialectic, Marx categorizes five different economic systems (means of production along with their relations of production): preclass societies, Asiatic societies, ancient societies, feudal societies, and capitalist societies. Preclass societies are like hunter–gatherer groups. These were small groups of people with a minimal division of labor (one that Marx termed the natural division of labor) and communal ownership of property (termed primitive communism). Asiatic societies were a special form in that they had particular problems to overcome due to their large populations. There was thus a tendency to form “oriental despotism” to solve these problems. Ancient societies developed around large urban centers, such as Rome. Private property and slave labor came into existence, as well as significant class inequality. Ancient societies were replaced by feudal systems wherein the primary economic form was serf labor tied to the land of the aristocracy. Feudal systems were replaced by capitalist systems. Eventually, the capitalist system will be replaced by socialism and that by communism. The specific dynamics that Marx says caused these shifts in economic systems are not important in our consideration right now. What is important to see is that for Marx, social change comes about because of inherent contradictions in the economic structure. What this implies is that to think like Marx is to think as a structuralist.

There are a number of dualisms in sociology. One of them concerns the tension between agency and structure: how free (agency) are people to be and act apart from social constraints (structure)? As a structuralist, Marx feels that social structures profoundly influence human thought, feelings, and action. Social change comes about not simply because of the free actions of the people, but because of changes in the social structure. These changes are prompted by the dialectical elements within every economic system.

To think like Marx, then, is to be driven by two main ideas. The first is the notion of species-being. Seeing society through this lens means to understand basic human nature as defined through production. It also implies that all true ideas are materially based. If human nature is founded on a unique way of existing in the world through creative production, then our most human (humane and humanistic) ideas must spring from the economy. This means two things. It first implies that true ideas are not abstract concepts with no basis in material reality. Human ideas are grounded and real, if they spring from creative production.

The other implication of this way of understanding consciousness and knowledge concerns false ways of knowing and existing. If ideas come from any other source than creative production, then they are simply counterfeit realities that lead to false consciousness and alienation. We will talk at length about these issues shortly, but for now I want us to see an important repercussion of this concept: to think like Marx means to be concerned about the inner, subjective world that human beings experience.

Marx has often been seen as anti-spiritual. This notion is far from the truth. Marx is deeply concerned with lifting human experience out of the quagmire and placing
our feet on higher ground. Species-being implies that humans are altruistic, social beings, but our sociability has been cut off and each person stands alone and naked due to cold capitalistic considerations. Species-being also implies that the individual person is filled with a creative capacity that has been disconnected and denied in the search for profit. Rather than being a cold materialist, Marx gives us a “spiritual existentialism in secular language” (Fromm, 1961, p. 5). To think like Marx, then, is to be critical of humanity’s inhumanity. “Marx’s philosophy is one of protest; it is a protest imbued with faith in man, in his capacity to liberate himself, and to realize his potentialities” (Fromm, 1961, p. vi).

The second idea that drives Marx’s thought is the material dialectic. Thus, to think like Marx also means to think in historical, structural terms. While Marx is overwhelmingly concerned with the authenticity of human experience, he sees that it is the economic structure that moves history and influences our inner person. Society, then, is objective and causative, through the economy and class relations. To think like Marx also means to have an historical perspective. It’s easy for us to be weighed down by the demands and problems of our lives. And it is thus easy for us to be concerned only with small segments of time and society. Yet Marxian thought is different; it is bigger. C. Wright Mills (1959) made this distinction clear when he spoke of personal troubles and public issues. He called this point of view the sociological imagination:

The first fruit of this imagination—and the first lesson of the social science that embodies it—is the idea that the individual can understand his own experience and gauge his own fate only by locating himself within his period, that he can know his own chances in life only by becoming aware of those of all individuals in his circumstances. (p. 5)

The balance of this chapter is divided into two smaller parts. In The Basic Features of Capitalism, we will be looking at class and class structure; value and exploitation; and industrialization, markets, and commodities. Throughout this section, we will see that these elements of capitalism are locked in dialectic, one that provides the engine of historical change and will eventually lead to the demise of capitalism, according to Marx. In the second section, we will talk about The Ramifications of Capitalism. In Marx’s understanding, economic systems are not sterile creatures; they create particular kinds of consciousnesses and relations with the world at large. Thus, capitalism brings with it alienation, private property, commodity fetish, false consciousness, and ideology. All of these issues exist and are understood because of species-being. But Marx holds out a hope for us through the dialectic: class consciousness will be produced as the structural conflicts resolve themselves, and capitalism will pass, not peacefully, into socialism.

The Basic Features of Capitalism

Class and class structure: As we have already seen, Marx is an economic determinist, which means he views the dynamic behind history as the process of production.
When Marx speaks about production, he is concerned with three intertwined issues: the means or actual process of production, the social relationships that form because of production, and the end result of production—the product. The **means of production** refers to the methods and materials that we use to bring into being those things that we need to survive. On a small scale, we might think of the air-hammers, nails, wood, concrete mixers, and so forth that we use to produce a house. Inherent within any means of production are the **relations of production**: in this case, the contractor, subcontractor, carpenter, financier, buyer, and so forth. In the U.S. economy, we organize the work of building a house through a contracting system. The person who wants the house built has to contract with a licensed builder who in turn hires different kinds of workers (day laborers, carpenters, foremen, etc.). The actual social connections that are created through particular methods of production are what Marx wants us to see in the concept of the relations of production.

Of course, Marx has something much bigger in mind than our example. In classic feudalism, for instance, people formed communities around a designated piece of land and a central manor for provision and security. At the heart of this local arrangement was a noble who had been granted the land from the king in return for political support and military service. At the bottom of the community was the serf. The serf lived on and from the land and was granted protection by the noble in return for service. Feudalism was a political and economic system that centered on land—land ownership was the primary means of production. People were related to the land through oaths of homage and fealty (the fidelity of a feudal tenant to his lord). These relations functioned somewhat like family roles and spelled out normative obligations and rights. The point here, of course, is that the way people related to each other under feudalism was determined by that economic system and was quite different than the way we relate to one another under capitalism: most of us don’t think of our boss as family.

For Marx, human history is the history of class struggles. Marx identifies several different types of classes, such as the feudal nobility, the bourgeoisie, the petite bourgeoisie, the proletariat, the peasantry, the subproletariat, and so on. As long as these classes have existed, they have been antagonistic toward each other. Under capitalism, however, two factors create a unique class system. The first thing capitalism does is lift economic work out of all other institutional forms. Under capitalism, the relationships we have with people in the economy are seen as distinctly different from religious, familial, or political relations. For most of human history, all these relationships overlapped. For example, in agriculturally based societies, family and work coincided. Fathers worked at home and all family members contributed to the work that was done. Capitalism lifted this work away from the farm, where work and workers were embedded in family, and placed it in urban-based factories. Capitalist industrialization thus disembodied work from family and social relations. Contemporary gender theorists point out that this movement created dual spheres of home and work, each controlled by a specific gender.

Marx, on the other hand, sees gender inequality reaching further back than capitalism, though capitalism has certainly accentuated gender problems. Marx, and more specifically Engels, was actually among the first to write on the issue of gender.
In 1877, an American anthropologist, Lewis H. Morgan, published a book that argued for the matrilineal origins of society. Both Marx and Engels felt that this was a significant discovery. Marx planned on writing a thesis based on Morgan’s work and made extensive notes along those lines. Marx never finished the work. Friedrich Engels, however, using Marx’s notes, did publish *The Origin of the Family, Private Property, and the State* in 1884. The argument is fairly simple, yet it presents one of the basic ways in which we understand how gender inequality and the oppression of women came about.

As with all of Marx and Engels’ work, Engels begins with a conception of primitive communist beginnings. In this setting, people lived communally, sharing everything, with monogamy rarely, if ever, practiced. Under such conditions, family is a social concern rather than a private issue, with children being raised by the community at large, rather than by only two parents. As a matter of fact, because identifying the father with any certainty was impossible in pre-modern society, paternity itself wasn’t much of an issue. Thus, in Marx’s way of thinking, “the communistic household implies the supremacy of women” (Engels, 1884/1978a, p. 735).

The key in the transition from matrilineal households to patriarchy is wealth. Primitive societies generally lived “from hand to mouth,” but as surplus began to be available, it became possible to accumulate. As men began to control this wealth, it was in their best interest to control inheritance, which meant controlling lineage. Engels (1884/1978a) says that the way this happened is lost in prehistory, but the effect “was the world-historic defeat of the female sex” (p. 736). In order to control the inheritance of wealth, men had to control fertilization and birth, which meant that men had to have power over women. Control over women’s sexuality and childbirth is why, according to Engels, we have developed a dual morality around gender—women are considered sluts but men are studs if they sleep around. Marriage, monogamy, and the paired family (husband and wife) were never intended to control men’s sexuality. They were created to control women’s sexuality in order to assure paternity. This control, of course, implied the control of the woman’s entire life. She became the property of the man so the man could control his property (wealth). Quoting Marx, Engels (1884/1978a) concludes, “The modern family contains in embryo not only slavery . . . . It contains within itself in miniature all the antagonisms which later develop on a wide scale within society and its state” (p. 737).

The second unique feature of class under capitalism is its bipolarization. That is, under capitalism, class tends to be structured around two positions—the bourgeoisie (owners) and the proletariat (workers). Marx does talk about other classes in capitalism, but they have declining importance. The petite bourgeoisie is the class of small land and business owners and the lumpenproletariat is the underclass (like the homeless). While the lumpenproletariat played a class-like position in early French history, Marx argues that because they have no relationship to economic production at all, they will become less and less important in the dynamics of capitalism. The petite bourgeoisie, on the other hand, does constitute a legitimate class in capitalism. However, this class shrinks in number and becomes less and less important, as they are bought out and pushed aside by powerful capitalists. It’s important to note that while most people in capitalist countries see business size as the result
of competition, Marx sees it as a result of structural dialectic processes. In other words, for Marx there is a hidden structure underneath the surface of these behaviors we generally think of as individualistic and competitive.

One of the principal dialectical processes that helps to polarize the classes is capitalism's business cycle (see Figure 3.3). Capitalism is defined by the reinvestment of profit to make more profit. This intrinsic part of capitalism brings with it certain elements that are destructive to capitalism. As capitalists reinvest capital, the demand for labor goes up. The increased demand for labor causes the labor pool, the number of unemployed, to shrink. As with any commodity, when demand is greater than the supply, the price goes up—in this case wages. The increase in wages causes profits to go down. As profits go down, capitalists cut back production, which precipitates a crisis in the economy. The crisis causes more workers to be laid off and small businesses (the petite bourgeoisie) to fold. These small businesses are bought out by the larger capitalists and the once small-scale capitalists become part of the working class. The result of this process being repeated over time is that the class of dependent workers increases and capital is centralized into fewer and fewer hands. Thus, the existing capitalists accumulate additional capital and the entire cycle starts again.
Figures that measure wealth and ownership over time are difficult to produce. Wealth in the United States is usually well hidden and ferreting out ownership lines is thorny at best. Nevertheless, we can find numbers that seem to substantiate the effects that Marx is talking about. While these are indirect measures at best, it is interesting to note that according to *Forbes* magazine (see Kennickell, 2003), the average wealth of the top 400 richest people in the United States rose from $921 million in 1989 to $2.1 billion in 2002. The distribution of income over time has likewise shifted upwards in the United States, according to Census data. In 1967, the top fifth of the population received 43.8% of the distributed income and the bottom fifth received just 4%. In 2001, the top fifth was paid 50.1% of the available income and the bottom fifth received 3.5%. The big drop in income between 1967 and 2001 actually was in the middle fifth: they dropped from 17.3% to 14.6%. Like I said, these figures don’t prove Marx’s theory, but they do provide some indication that the control of capital is centralizing into fewer and fewer hands.

As a result of this business cycle, three things occur. First, the size of the capitalist class shrinks. For Marx that means that when the revolution does come about, it will be easy to take over power from fewer capitalists. Of course, the second thing that occurs is that the size of the working class army increases, which will give them more power. And finally, the gap between the owners and the workers becomes more and more apparent, leading to a bi-polarization of conflict (the reduction of conflict to two parties).

The bi-polarization of conflict is a necessary step for Marx in the process of social change, and an important one for conflict theory as a whole. Overt and intense conflict are both dependent upon bi-polarization; crosscutting interests, that is, having more than one issue over which groups are in conflict, tend to pull resources (emotional and material) away from conflict. For example, during WWII it was necessary for the various nations to coalesce into only two factions, the Axis and the Allied powers. So the United States became strange bedfellows with the Soviet Union in order to create large-scale, intense conflict. Note that each time the United States has engaged in a police action or war, attempts are made to align resources in as few camps as possible. This move isn’t simply a matter of world opinion; it is a structural necessity for violent and overt conflict. The lack of bi-polarized conflict creates an arena of crosscutting interests that can drain resources and prevent the conflict from escalating and potentially resolving.

*Value and exploitation:* Marx forms much of this theory of capitalism in direct contrast to the political economists of his day. For most political economists in Marx’s time, commodities, value, profit, private property, and the division of labor were seen as natural effects of social evolution. However, Marx takes a critical perspective and sees these same processes as instruments of oppression that dramatically affect people’s life chances.
One of the important issues confronting early political economists concerned the problem of value. We may have a product, such as a car, and that product has value, but from where does its value come? More importantly, why would anybody pay more for the car than it is worth? Well, you say, only a sucker would pay more for a car than it is worth. Yet, as you’ll see, there is a way in which we all pay more for every commodity or economic good than it is worth. That was what struck the early economists as a strange problem to be solved.

In order to understand this issue, Adam Smith, an early economist and author of *Inquiry Into the Nature and Causes of the Wealth of Nations* (1776), came up with some useful concepts. He argues that every commodity has at least two different kinds of values: use-value and exchange-value. *Use-value* refers to the actual function that a product contains. This function gets used up as the product is used. Take a bottle of beer, for example. The use-value of a bottle of beer is its taste and alcoholic effect. As we drink the bottle, those functions are expended. Beer also has exchange-value that is distinct from use-value. *Exchange-value* refers to the rate of exchange one commodity bears when compared to other commodities. Let’s say I make a pair of shoes. Those shoes could be exchanged for 1 leatherbound book or 5 pounds of fish or 10 pounds of potatoes or 1 cord of oak wood, and so on.

This notion of exchange-value poses a question for us: what do the shoes, books, fish, and potatoes have in common that allow them to be exchanged? I could exchange my pair of shoes for the leatherbound book and then exchange the book for a keg of beer. The keg of beer might have a use-value for me where the leather book does not; nonetheless, they both have exchange-value. This train of exchange could be extended indefinitely with me never extracting any use-value from the products at all, which implies that exchange- and use-value are distinct. So, what is the common denominator that allows these different items to be exchanged? What is the source of exchange-value?

Smith argues, and Marx agrees, that the substance of all value is human labor: “Labour, therefore, is the real measure of the exchangeable value of all commodities” (Smith, 1776/1937, p. 30). There is labor involved in the book, the fish, the shoes, the potatoes, and in fact everything that people deem worthy of being exchanged. It is labor, then, that creates exchange-value. If we stop and think for a moment about Marx’s idea of species-being, we can see why Smith’s notion appealed to him: the value of a product is the “humanness” it contains.

This explanation is termed the *labor theory of value*, and it is the reason why Marx thinks money is so insidious. The book, the shoes, and the potatoes can have exchange-value because of their common feature—human labor. If we then make all those commodities equal to money—the universal value system—then labor is equated with money: “This physical object, gold [or money] . . . becomes . . . the direct incarnation of all human labour” (Marx, 1867/1977, p. 187), which of course adds to the experience of alienation from species-being.

In employing the two terms, Smith tends to collapse them, focusing mainly on exchange-value. Nevertheless, Marx maintains the distinction and argues that the difference between use-value and exchange-value is where profit is found (we pay more for a product than its use-value would indicate). Smith eventually argued that profit is simply added by the capitalist. Profit in Smith’s theory thus becomes
arbitrary and controlled by the “invisible hand of the market.” However, in analyzing value, Marx discovers a particular kind of labor—surplus labor—and argues that profit is better understood as a measurable entity that he calls exploitation.

Like Smith, Marx distinguishes between the use-value of a product and its exchange-value in the market. Capital, then, is created by using existing commodities to create a new commodity whose exchange-value is higher than the sum of the original resources used. This situation was odd for Marx. From where did the added value come? His answer, like Smith’s original one, is human labor. But he took Smith’s argument further. Human labor is a commodity that is purchased for less than its total worth. According to the value theory of labor, the value of any commodity is determined by the labor time necessary for the production or replacement of that commodity. So, what does it cost to produce human labor? The cost is reckoned in terms of the necessities of life: food, shelter, clothing, and so on. Marx also recognizes that a comparative social value has to be added to that list as well. What constitutes a “living wage” will thus be different in different societies. Marx calls the labor needed to pay for the worker’s cost of living necessary labor. The issue for Marx is that the cost of necessary labor is less than that of what the worker actually produces.

The capitalist pays less for a day’s work than its value. I may receive $75.00 per day to work (determined by the cost to bare sustenance the worker plus any social amenities deemed necessary), but I will produce $200.00 worth of goods or services. The necessary labor in this case is $75.00. The amount of labor left over is the surplus labor (in this case, $125.00). The difference between necessary labor and surplus labor is the rate of exploitation. Different societies can have different levels of exploitation. For example, if we compare the situation of automobile workers in the United States with those in Mexico, we will see that the level of exploitation is higher in Mexico (which is why U.S. companies are moving so many jobs out of the country). Surplus labor and exploitation are the places from which profit comes: “The rate of surplus-value is . . . an exact expression for the degree of exploitation . . . of the work by the capitalist” (Marx, 1867/1977, p. 326).

By definition, capitalists are pushed to increase their profit margin and thus the level of surplus labor and the rate of exploitation. There are two main ways in which this can be done: through absolute and relative surplus labor. The capitalist can directly increase the amount of time work is performed by either lengthening the workday, say from 10 to 12 hours; or he or she can remove the barriers between “work” and “home,” as is happening as a result of increases in communication (computers) and transportation technologies. The product of this lengthening is called absolute surplus labor. The other way a capitalist can increase the rate of exploitation is to reduce the amount of necessary labor time. The result of this move is called relative surplus labor. The most effective way in which this is done is through industrialization. With industrialization, the worker works the same number of hours but her or his output is increased through the use of machinery. These different kinds of surplus labors can get a bit confusing, so I’ve compared them in Figure 3.4.

The figure starts off with the type of surplus labor employed. Since there is always exploitation (you can’t have capitalism without it), I’ve included a “base rate” for the purpose of comparison. Under this scheme, the worker has a total
output of $200.00; he or she gets paid $50.00 of the $200.00 produced, which leaves a rate of exploitation of about 63%, or $125.00. The simplest way to increase profit, or the rate of exploitation, is to make the worker work longer hours or take on added responsibilities without raising pay (as a result of downsizing, for example). In our hypothetical case, the wage of $75.00 remains, but the profit margin (rate of exploitation) goes up to 75%. By automating production, the capitalist is able to extract more work from the worker, thus increasing the total output and the level of exploitation (91%). If this seems natural to us (capitalists have a right to make a profit), Marx would say that it is because we have bought into the capitalist ideology. We should also keep in mind that in their search for maintaining or increasing the rate of exploitation, capitalists in industrialized nations export their exploitation—they move jobs to less developed countries.

Industrialization, markets, and commodification: **Industrialization** is the process through which work moves from being performed directly by human hands to having the intermediate force of a machine. Industrialization increases the level of production (by increasing the level of relative surplus labor), which in turn expands the use of markets, because the more product we have, the more points of purchase we need. The relationships among industrialization, production, and markets are reciprocal so that they are mutually reinforcing. If a capitalist comes up with a new “labor-saving” machine, it will increase production, and increased production pushes for new or expanded markets in which to sell the product. These expanding markets also tend to push for increased production and industrialization. Likewise, if a new market opens up through political negotiations (like with Mexico or China, for the United States) or the invention of a new product, there will be a corresponding push for increased production and the search for new machinery.

An important point to note here is that capitalism requires expanding markets, which implies that markets and their effects may be seen as part of the dialectic of
capitalism. In capitalism, there is always a push to increase profit margins. To increase profits, capitalists can expand their markets horizontally and vertically, in addition to increasing the level of surplus labor. In fact, profit margins would slip if capitalists did not expand their markets. For example, one of the main reasons that you probably have a CD player is that the market for cassette tape players bottomed out (and now there is a push for MP3 and newer technologies). Most people who were going to buy a cassette player had already done so, and the only time another would be purchased is for replacement. So, capitalists invented something new for you to buy so that their profit margin would be maintained.

In general, markets refer to an arena in which commodities are exchanged between buyers and sellers. For example, we talk about the grocery market and the money market. These markets are defined by the products they offer and the social network involved. Markets in general have certain characteristics that have consequences for both commodities and people. They are inherently susceptible to expansion (particularly when driven by the capitalist need for profit), abstraction (so we can have markets on markets, like stock market futures or the buying and selling of home mortgage contracts), trade cycles (due to the previous two issues), and undesirable outputs (such as pollution); and they are amoral (so they may be used to sell weapons, religion, or to grant access to health care).

The speed at which goods and services move through markets is largely dependent upon a generalized medium of exchange, something that can act as universal value. Barter is characterized by the exchange of products for one another. The problem with bartering is that it slows down the exchange process because there is no general value system. For example, how much is a keg of beer worth in a barter system? We can’t really answer that question because the answer depends on what it is being exchanged for, who is doing the exchanging, what their needs are, where the exchange takes place, and so on. Because of the slowness of bartering, markets tend to push for more generalized means of exchange—such as money. Using money, we can give an answer to the keg question, and having such an answer speeds up the exchange process quite a bit. Marx argues that as markets expand and become more important in a society, and the use of money for equivalency becomes more universal, money becomes more and more the common denominator of all human relations. As Marx (1932/1978b) says,

By possessing the property of buying everything, by possessing the property of appropriating all objects, money is thus the object of eminent possession. The universality of its property is the omnipotence of its being. It therefore functions as the almighty being. Money is the pimp between man’s need and the object, between his life and his means of life. But that which mediates my life for me, also mediates the existence of other people for me. For me it is the other person. (p. 102)

The expansive effect of markets on production is called the process of commodification. The concept of commodification describes the process through which more and more of the human life-world is turned into something that can be bought or sold. So, instead of creatively producing the world as in species-being,
people increasingly buy (and sell) the world in which they live. This process of commodification becomes more and more a feature of human life because it continually expands. Think of a farming family living in the United States around 1850 or so. That family bought some of what they needed, and they bartered for other things, but the family itself produced much of the necessities of life. Today the average American family buys almost everything they want or need. The level of commodification is therefore much higher today.

These mutually reinforcing relationships are pictured in Figure 3.5. As you can see, I've placed profit motivation as the driving force. This indicates, as Marx would argue, that these effects are a result of an intrinsic feature of capitalism, and thus part of the dialectic. Marx sees these relationships as mutually reinforcing and multiplying—that is, they continue to expand at ever-increasing rates. Notice also the feedback loop from the level of commodification. As more and more of our life-world becomes fair game for commodification, the possibilities for new markets expand.

As you can tell, once in place, these elements of capitalism are self-reinforcing. Money facilitates exchanges in markets; money and the drive for profit push the size and exchange rate of markets, which in turn pushes for increased production and commodification. One of the things that Marx points out is that human beings have the unusual ability to create their own needs. Animal needs are basically tied to instinct and survival, but once humans begin to create commodities, we create our own needs (I really do need a sub-woofer for my stereo). The potential, then, for the production of commodities is endless; commodification once begun takes on a life of its own. As the ideas of capitalism take root and people begin to see the human life-world in terms of things that can be bought or sold, there is a constant urge to find what else can be used to make a profit.

The capitalist drive for expanding profits and the endless potential for commodification is one of the prime factors in back of what is now called globalization. While
there are other factors at work (such as global information and communication systems), expansive markets and commodification are particularly salient. Marx foresaw some of this. He writes in *The Communist Manifesto*, “The need of a constantly expanding market for its products chases the bourgeoisie over the whole face of the globe. It must nestle everywhere, settle everywhere, establish connexions everywhere. The bourgeoisie has through its exploitation of the world-market given a cosmopolitan character to production and consumption in every country” (Marx & Engels, 1848/1978, p. 476). Marx indicates that global markets and commodification lead to an interesting result—a cosmopolitan character to production and consumption. As commodities are fitted for the global market and as we become globalized consumers, the purchased good (and the consumer) becomes emptied of its local meanings and idiosyncrasies. For example, I have a friend from China who, when we go out for Chinese food, says, “This isn’t Chinese food.” In order to make commodities palatable to everyone, we have to make them bland (and this doesn’t simply apply to food). Recently, George Ritzer (2004b) in a provocative book refers to this kind of phenomenon as “the globalization of nothing within the realm of consumption, itself proliferating throughout the globe at a breathtaking rate” (p. x). We will talk more about the trivializing effects of commodification when we get to Simmel; but it begins here with Marx.

### The Ramifications of Capitalism

*Alienation, private property, and commodity fetish:* We often think of alienation as the subjective experience of a worker on an assembly line or at McDonald’s. This perception is partly true. To get a little better handle on it, however, let’s think about the differences between a gunsmith and a worker in a Remington plant. The gunsmith is a craftsperson and would make every part of the gun by hand—all the metal work, all the woodwork, everything. If you knew guns, you could tell the craftsperson just by looking at the gun. It would bare the person’s mark because part of the craftsperson was in the work, and the gunsmith would take justifiable pride in the piece.

Compare that experience to the Remington plant worker. Perhaps she is the person who bolts the plastic end piece on the butt of the rifle, and she performs the task on rifle after rifle, day after day. It won’t take long until the work becomes mind numbing. It is repetitive and non-creative. Chances are, this worker won’t feel the pride of the craftsperson but will instead experience disassociation and depression. We can see in this example some of the problems associated with a severe division of labor and over-control of the worker. There’s no ownership of the product or pride as there is in craftsmanship. We can also see how the same issues would apply to the worker at McDonald’s. All of it is mind-numbing, depressive work, and much of it is the result of the work of scientific management.
Frederick Taylor was the man who applied the scientific method to labor. He was interested in finding the most efficient way to do a job. Efficiency here is defined in terms of the least amount of work for the greatest amount of output. Under this system, the worker becomes an object that is directly manipulated for efficiency and profit. Taylor would go out into the field and find the best worker. He and his team would then time the worker (this is the origin of time-management studies) and break the job down into its smallest parts. In the end, Taylorism created a high division of labor, assembly lines, and extremely large factories.

The problem with understanding our Remington and McDonald’s examples as alienation is that it focuses on the subjective experience of the worker. It implies that if we change the way we control workers—say from Taylorism to Japanese management, as many American companies have—we’ve solved the problem of alienation. For Marx, that wouldn’t be the case. While alienation implies the subjective experience of the worker (depression and disassociation), it is more accurate to think of it as an objective state. So workers under the Japanese system are not structurally less alienated because they are more broadly trained, are able to rotate jobs, work holistically, and have creative input. Workers are alienated under all forms of capitalism, whether they feel it or not. Alienation is a structural condition, not a personal one. Workers are of course more likely to revolt if they experience alienation, but that is a different issue.

Alienation always exists when someone other than the worker owns the means of production and the product itself. Having said that, we can note that Marx actually talked about four different kinds of alienation. Alienation in its most basic sense is separation from one’s own awareness of being human. We know we are human; Marx doesn’t mean to imply that we don’t have the idea of being human. What he means is that our idea is wrong or inaccurate. Recall Marx’s argument of species-being: that which makes us distinctly human is creative production, and we become aware of our humanity as our nature is clearly reflected back to us by the mirror of the produced world. At best, the image is distorted if we look to see our nature in the things we own. It’s the right place to look, but according to Marx, products should be the natural expression of species-being and production should result in true consciousness. The commodity itself does not reflect humanity, and thus, everything about our commodities is wrong. At worst, the image is simply false. Marx argues that if we look elsewhere for our definition and knowledge of human nature (such as using language; having emotions; possessing a soul, religion, rationality, free-will, and so on), it is not founded on the essential human characteristic—free and creative production. Thus, the human we see is rooted in false consciousness.

From this basic alienation, three other forms are born: alienation from the work process, alienation from the product itself, and alienation from other people. In species-being, there is not only the idea of the relationship between consciousness and creative production, there is also the notion that human beings are related to one another directly and intimately through species-being. We don’t
create a human world individually; it is created collectively. Therefore, under conditions of species-being, humans are intimately and immediately connected to one another. The reflected world around them is the social, human world that they created. Imagine, if you can, a world of products that are all directly connected to human beings (not market forces, advertising, the drive for profit, and so forth). Either you made everything in that world or you know who did. When you see a product, you see yourself or you see your neighbor or your neighbor’s friend. Thus, when we are alienated from our own species-being, because someone else controls the means and ends of production, we are estranged from other humans as well.

Finally, of course, we are alienated from the process of work and from the product itself. There is something essential in the work process, according to Marx. The kind of work we perform and how we perform that work determines the kind of person we are. Obviously, doctors are different from garbage collectors, but that isn’t what Marx has in mind. An individual’s humanity is rooted in the work process. When humans are cut off from controlling the means of production (the way in which work is performed and for what reason), then the labor process itself becomes alienated. There are three reasons for this alienated labor, which end in the alienation of the product. First, when someone else owns the means of production, the work is external to the worker; that is, it is not a direct expression of his or her nature. So, rather than being an extension of the person’s inner being, work becomes something external and foreign. Second, work is forced. People don’t work because they want to; they work because they have to—under capitalism, if you don’t work you die. Concerning labor under capitalism Marx (1932/1995) says, “Its alien character is clearly shown by the fact that as soon as there is no physical or other compulsion it is avoided like the plague” (pp. 98–99). And third, when we do perform the work, the thing that we produce is not our own; it belongs to another person.

Further, alienation, according to Marx, is the origin of private property—it exists solely because we are cut off from our species-being; someone else owns the means and ends of production. Underlying markets and commodification—and capitalism itself—is the institution of private property. Marx felt that the political economists of his day assumed the fact of private property without offering any explanation for it. These economists believed that private property was simply a natural part of the economic process. But for Marx, the source of private property was the crux of the problem. Based on species-being, Marx argues that private property emerged out of the alienation of labor.

Marx also argues that there is a reciprocal influence of private property on the experience of alienation. As we have seen, Marx claims that private property is the result of alienated labor. Once private property exists, it can then exert its own influence on the worker and it becomes “the realization of this alienation” (Marx, 1932/1995, p. 106). Workers then become controlled by private property. This notion is most clearly seen in what Marx describes as commodity fetish: workers become infatuated with their own product as if it were an alien thing. It confronts them not as the work of their hands, but as a commodity, something alien to them that they must buy and appropriate.

Commodity fetish is a difficult notion and it is hard to come up with an illustration. Workers create and produce the product, yet we don’t recognize our work
or ourselves in the product. So we see it outside of us and we fall in love with it. We have to possess it, not realizing that it is ours already by its very nature. We think it, the object, will satisfy our needs, when what we need is to find ourselves in creative production and a socially connected world. We go from sterile object to sterile object, seeking satisfaction, because they all leave us empty. To use a science fiction example, it’s like a male scientist who creates a female robot, but then forgets he created it, falls in love with it, and tries to buy its affection through money. As I said, it is a difficult concept to illustrate because in this late stage of capitalism, our entire world and way of living are the examples. In commodity fetish, our perception of self-worth is linked with money and objects in a vicious cycle.

In addition, in commodity fetish we fail to recognize—or in Marxian terms, we misrecognize—that there are sets of oppressive social relations in back of both the perceived need for and the simple exchange of money for a commodity. We think that the value of the commodity is simply its intrinsic worth—that’s just how much a Calvin Klein jacket is worth—when, in fact, hidden labor relations and exploitation produce its value. We come to need these products in an alienated way: we think that owning the product will fulfill our needs. The need is produced through the commodification process, and in back of the exchange itself are relations of oppression. In this sense, the commodity becomes reified: it takes on a sense of reality that is not materially real at all.

Contemporary Marxists argue that the process of commodification affects every sphere of human existence and is the “central, structural problem of capitalist society in all its aspects” (Lukács, 1922/1971, p. 83). Commodification translates all human activity and relations into objects that can be bought or sold. In this process, value is determined not by any intrinsic feature of the activity or the relations, but by the impersonal forces of markets, over which individuals have no control. In this expanded view of commodification, the objects and relations that will truly gratify human needs are hidden, and the commodified object is internalized and accepted as reality. So, for example, a young college woman may internalize the commodified image of thinness and create an eating disorder such as anorexia nervosa that rules her life and becomes unquestionably real. Commodification, then, results in a consciousness based on reified, false objects. It is difficult to think outside this commodified box. There is, in fact, a tendency to justify and rationalize our commodified selves and behaviors.

False consciousness and religion: Alienation, false consciousness, and ideology go hand in hand. In place of a true awareness of species-being comes false consciousness, consciousness built on any foundation other than free and creative production. Humans in false consciousness thus come to think of themselves as defined through the ability to have ideas, concepts, and abstract thought, rather than production. When these ideas are brought together in some kind of system, Marx considers them to be ideology. Ideas function as ideology when they are perceived as independent entities that transcend historical, economic relations: ideologies contain beliefs that we hold to be true and right, regardless of the time or place (like the value of hard work and just reward). In the main, ideologies serve to either justify current power arrangements (like patriarchy) or to legitimate social movements (like feminism) that seek to change the structure.
Though Marx sometimes appears to use the terms interchangeably, in some ways I think it is important to keep the distinction between false consciousness and ideology clear. Ideologies can change and vary. For example, the ideology of consumerism is quite different than the previous ideologies of the work ethic and frugality, yet they are all capitalist ideologies. The ideologies behind feminism are different than the beliefs behind the racial equality movement, yet from Marx’s position, both are ideologies that blind us to the true structure of inequality: class. Yet false consciousness doesn’t vary. It is a state of being, somewhat like alienation in this aspect. We are by definition in a state of false consciousness because we are living outside of species-being. The very way through which we are aware of ourselves and the world around us is false or dysfunctional. The very method of our consciousness is fictitious.

Generally speaking, false consciousness and ideology are structurally connected to two social factors: religion and the division of labor. For Marx, religion is the archetypal form of ideology. Religion is based on an abstract idea, like God, and religion takes this abstract idea to be the way through which humans can come to know their true nature. So, for example, in the evangelical Christian faith, believers are exhorted to repent from not only their sinful ways but also their sinful nature and to be born again with a new nature—the true nature of humankind. Christians are thus encouraged to become Christ-like because they have been created in the image of God. Religion, then, reifies thought, according to Marx. It takes an abstract (God), treating it as if it is materially real, and it then replaces species-being with non-materially based ideas (becoming Christ-like). It is, for Marx, a never-ending reflexive loop of abstraction, with no basis in material reality whatsoever. Religion, like the commodity fetish, erroneously attributes reality and causation. We pour ourselves out, this time into a religious idea, and we misrecognize our own nature as that of god or devil. Religion is ideological because it is based in and reifies ideas (reification).

There is also a second sense in which religion functions as ideology. Marx uses the term ideology as apologia, or a defense of one’s own ideas, opinions, or action. In this kind of ideology, the orientation and beliefs of a single class, the elite, become generalized and seem to be applicable to all classes. Here the issue is not so much reification as class consciousness. The problem in reification is that we accept something as real that isn’t. With ideology, the problem is that we are blinded to the oppression of the class system. This is in part what Marx means when he claims that religion is “the opium of the people.” As we have seen, Marx argues that because most people are cut off from the material means of production, they misrecognize their true class position and the actual class-based relationships, as well as the effects of class position. In the place of class consciousness, people accept an ideology. For Marx, religion is the handmaiden of the elite; it is a principal vehicle for transmitting and reproducing the capitalist ideology.

Thus, in the United States we tend to find a stronger belief in American ideological concepts (such as meritocracy, equal opportunity, work ethic, poverty as the result of laziness, free enterprise, and so on) among the religious (particularly
among the traditional American denominations). We would also expect to see religious people being less concerned with the social foundations of inequality and more concerned with patience in this life and rewards in the next. These kinds of beliefs, according to Marx, dull the workers’ ability to institute social change and bring about real equality.

It is important to note that this is a function of religion in general, not just American religion. The Hindu caste system in India is another good example. There are five different castes in the system: Brahmin (priests and teachers), Kshatriya (rulers), Vaishya (merchants and farmers), Shudra (laborers and servants), and Harijans (polluted laborers, the outcastes). Position in these different castes is a result of birth; birth position is based on karma (action); and karma is based on dharma (duty). There is virtually no social mobility among the castes. People are taught to accept their position in life and perform the duty (dharma) that their caste dictates so that their actions (karma) will be morally good. This ideological structure generally prevents social change, as does the Christian ideology of seeking rewards in heavenly places.

For Marx, then, religion simultaneously represents the furthest reach of humanity’s misguided reification and functions to blind people to the underlying class conditions that produce their suffering. Yet Marx (1844/1979) also recognizes that those sufferings are articulated in religion as the sigh of the oppressed: “Religious suffering is at the same time an expression of real suffering and a protest against real suffering. Religion is the sigh of the oppressed creature, the sentiment of a heartless world, and the soul of soulless conditions. It is the opium of the people” (p. 54). Marx thus recognizes that religion also gives an outlet to suffering. He feels that religion places a “halo” around the “veil of tears” that is present in the human world. The tears are there because of the suffering that humans experience when they don’t live communally and cooperatively. Marx’s antagonism toward religion, then, is not directed at religion and God per se, but at “the illusory happiness of men” that religion promises.

Most if not all of Marx’s writings on religion were in response to already existing critiques (mostly from Georg Hegel and Ludwig Feuerbach). Marx, then, takes the point of view that “the criticism of religion has largely been completed.” What Marx is doing is critiquing the criticism. He is responding to already established ideas about religion, not religion itself necessarily. What Marx wants to do is to push us to see that the real issue isn’t religion; it is the material, class-based life of human beings that leads to actual human suffering.

In keeping with that notion, a school of contemporary Marxism, Humanistic Marxism, most notably the area of Liberation Theology, sees religion as an agent of social change. Liberation theologians argue that there are two poles of Christian expression. The one pole is the classic ideological version, where religion serves to maintain the establishment. The other pole emphasizes compassion for the human condition and leadership in social change. The first gives importance to the “meek and mild Jesus” who taught that the proper response to oppression was to turn the other cheek. The second stresses the Christ in the temple who in rage overturned the tables of the moneychangers and drove them out with a whip. So, there are some Marxists that argue that religion can function as an agent of social change, but that kind of religion is very specific and is not encountered very often.
Marx also sees ideology and alienation as structurally facilitated by the *division of labor* (how the duties are assigned in any society). Marx talks about several different kinds of divisions of labor. The most primitive form of separation of work is the “natural division of labor.” The natural division was based upon the individual’s natural abilities and desires. People did not work at something for which they were ill suited, nor did they have to work as individuals in order to survive. Within the natural division of labor, survival is a group matter, not an individual concern. Marx claims that the only time this ever existed was in preclass societies. When individuals within a society began to accumulate goods and exercise power, the “forced division of labor” replaced the natural division. With the forced division individual people must work in order to survive (sell their labor) and they are forced to work at jobs they neither enjoy nor have the natural gifts to perform. The forced division of labor and the *commodification of labor* characterize capitalism.

This primary division of labor historically becomes extended when mental labor (such as that performed by professors, priests, philosophers) is divided from material labor (workers). When this happens, reification, ideology, and alienation reach new heights. As we’ve seen, Marx argues that people have true consciousness only under conditions of species-being. Anytime people are removed from controlling the product or the production process, there will be some level of false consciousness and ideology. Even so, workers who actually produce a material good are in some way connected to the production process. However, with the separation of mental from material labor, even this tenuous relationship to species-being is cut off. Thus, the thought of those involved with mental labor is radically cut off from what makes us human (species-being). As a result, everything produced by professors, priests, philosophers, and so on has some reified ideological component and is generally controlled by the elite.

*Class consciousness:* So far we have seen that capitalism increases the levels of industrialization, exploitation, market-driven forces like commodification, false consciousness, ideology, and reification, and it tends to bifurcate the class structure. On the other hand, Marx also argues that these factors have dialectical effects and will thus push capitalism inexorably toward social change. Conflict and social change begin with a change in the way we are aware of our world. It begins with class consciousness.

Marx notes that classes exist objectively, whether we are aware of them or not. He refers to this as a “class in itself,” that is, an aggregate of people who have a common relationship to the means of production. But classes can also exist subjectively as a “class for itself.” It is the latter that is produced through class consciousness. *Class consciousness* has two parts: the subjective awareness that experiences of deprivation are determined by structured class relations and not individual talent and effort; and the group identity that comes from such awareness.

Industrialization has two main lines of effects when it comes to class consciousness. First, it tends to increase exploitation and alienation. We’ve talked about both of these already, but remember that these are primarily objective states for Marx. In other words, these aren’t necessarily subjectively felt—alienation isn’t chiefly a
feeling of being psychologically disenfranchised; it is the state of being cut off from species-being. Humans can be further alienated and exploited, and machines do a good job of that. What happens at this point in Marx’s scheme is that these objective states can produce a sense (or feeling) of belonging to a group that is disenfranchised, that is, class consciousness.

As you can see from Figure 3.6, industrialization has positive relationships with both exploitation and alienation. As capitalists employ machinery to aid in labor, the objective levels of alienation and exploitation increase. As the objective levels increase, so does the probability that workers will subjectively experience them, thus aiding in the production of class consciousness. Keep in mind that industrialization is a variable, which means that it can increase (as in when robots do the work that humans once did on the assembly line—there is a human controlling that robot, but far, far removed from the labor of production) or decrease (as when “cottage industries” spring up in an economy).

The second area of effect is an increase in the level of worker communication. Worker communication is a positive function of education and ecological concentration. Using machines—and then more complex machines—requires increasing levels of technical knowledge. A crude but clear example is the different kinds of knowledge needed to use a horse and plow compared to a modern tractor. Increasing the use of technology in general requires an increase in the education level of the worker (this relationship is clearly seen in today’s computer-driven U.S. labor market).

In addition, higher levels of industrialization generally increase the level of worker concentration. Moving workers from small guild shops to large-scale
machine shops or assembly lines made interaction between these workers possible in a way never before achievable, particularly during break and lunch periods when hundreds of workers can gather in a single room. Economies of scale tend to increase this concentration of the workforce as well. So for a long time in the United States, we saw ever-bigger factories being built and larger and larger office buildings (like the Sears Tower and World Trade Center—and it is significant that terrorists saw the World Trade Center as representative of American society). These two processes, education and ecological concentration, work together to increase the level of communication among workers. These processes are supplemented through greater levels of communication and transportation technologies. Marx argues that communication and transportation would help the worker movement spread from city to city.

So, in general, class consciousness comes about as workers communicate with each other about the problems associated with being a member of the working class (like not being able to afford medication). The key to Marx's thinking here is to keep in mind that these things come about due to structural changes brought about simply because of the way capitalism works. Capitalists are driven to increase profits. As a result, they use industrialization, which sets in motion a whole series of processes that tend to increase the class consciousness of the workers. Class consciousness increases the probability of social change. As workers share their grievances with one another, they begin to doubt the legitimacy of the distribution of scarce resources, which in turn increases the level of overt conflict. As class inequality and the level of bi-polarization increase, the violence of the conflict will tend to increase, which in turn brings about deeper levels of social change.

However, class consciousness has been difficult to achieve. There are a number of reasons given as to why this is true, but many Marxist approaches focus on the relationships among a triad of actors: the state, the elite, and workers. Marx felt that as a result of the rise of class consciousness, and other factors such as the business cycle, workers would unite and act through labor unions to bring about change. Some of the work of the unions would be violent, but it would eventually lead to a successful social movement. In the end, the labor movement would bring about socialism.

Marx sees two of the actors in the triad working in collusion. He argues that under capitalism, the state is basically an arm of the elite. It is controlled by capitalists and functions with capitalist interests in mind. Many of the top governing officials come from the same social background as the bourgeoisie. A good example of this in the United States is the Bush family. Of course, electing a member of the capitalist elite to high public office not only prejudices the state toward capitalist interests, it is also an indicator of how ideologically bound a populace is.

In addition, as C. W. Mills argues, the elite tend to cross over, with military men serving on corporate boards and as high-placed political appointees, and CEOs functioning as political advisees and cabinet members, and so on. A notable example of these kinds of interconnections is Charles Erwin Wilson, president of General Motors from 1941 to 1953. He was appointed Secretary of Defense under President Dwight D. Eisenhower. At his senate confirmation hearing, Wilson spoke the words that epitomize the power elite: "For years, I thought what was good for our country was good for General Motors—and vice versa."
In response to the demands of labor unions, certain concessions were ultimately granted to the working and middle classes. Work hours were reduced and healthcare provided, and so forth. Capitalists working together with a capitalist-privileging state granted those concessions. Thus, even when allowances are granted, they may function in the long run to keep the system intact by maintaining the capitalists’ position, silencing the workers, and preventing class consciousness from adequately forming.

The state is also active in the production of ideology. Marx sees the state as somewhat ill-defined. In other words, where the state begins and ends under capitalist democracy is hard to say. The state functions through many other institutions, such as public schools, and its ideology is propagated through such institutions, not only through such direct means as the forced pledge of allegiance in the United States but also through indirect control measures like specific funding initiatives. A good deal of the state’s ideology is, of course, capitalist ideology. As a result, the worker is faced with a fairly cohesive ideology coming from various sources. This dominant ideology creates a backdrop of taken-for-grantedness about the way the world works, against which it is difficult to create class consciousness.

The movement of capitalist exploitation across national boundaries, which we mentioned before, accentuates the “trickle-down” effect of capitalism in such countries as the United States. Because workers in other countries are being exploited, the workers in the United States can be paid an inflated wage (inflated from the capitalists’ point of view). This is functional for capitalism in that it provides a collection of buyers for the world’s goods and services. Moving work out from the United States and making it the world’s marketplace also changes the kind of ideology or culture that is needed. There is a movement from worker identities to consumer identities in such economies.

In addition, capitalists use this world labor market to pit workers against one another. While wages are certainly higher due to exported exploitation, workers are also aware that their jobs are in jeopardy as work is moved out of the country. Capitalism always requires a certain level of unemployment. The business cycle teaches us this—that zero unemployment means higher wages and lower profits. The world labor market makes available an extremely large pool of unemployed workers. So, workers in an advanced industrialized economy see themselves in competition with much cheaper labor. This global competition also hinders class consciousness by shifting the worker’s focus of attention away from the owners and onto the foreign labor market. In other words, a globalized division of labor pits worker against worker in competition for scarce jobs. This competition is particularly threatening for workers in advanced capitalist countries, like the United States, because the foreign workers’ wage is so much lower. These threatened workers, then, will be inclined to see their economic problems in terms of global, political issues rather than class issues.

Further, the workers divide themselves over issues other than class. We tend to see ourselves not through class-based identities, which Marx would argue is the identity that determines our life chances; instead, we see ourselves through racial, ethnic, gender, and sexual preference identities. Marxists would argue that the culture of diversity and victimhood is part of the ideology that blinds our eyes to true social inequality, thus preventing class consciousness.
Thinking About Modernity and Postmodernity

Machines of production and consciousness: Marx has a very clear notion of modernity, though he doesn’t use the concept itself. As we’ve seen, Marx argues that society in general evolves and changes due to variations in the economic system. The means of production determines the relations of production (or the social relations). Marx named five different economic societies: preclass societies, Asiatic societies, ancient societies, feudal societies, and capitalist societies. Societies that contain the capitalist dynamics that we have been talking about are, of course, modern. We would expect, then, for a Marxian view of postmodernity to argue that something has changed the basic configuration of capitalism. Interestingly, we will find as we move through each of our theorists that many of the postmodern thinkers we will consider have some relation to Marxian theory. For now, though, I want us to focus on the central issue for Marx: the means of production.

Fredric Jameson (1984) argues that modern capitalism has gone through three distinct phases, each linked to a particular kind of technology. Early-market capitalism was distinguished by steam-driven machinery; mid-monopoly capitalism was characterized by steam and combustion engines; and late-multinational capitalism is associated with nuclear power and electronic machines. The important Marxian issue here is the relationship between the mode of production and consciousness. As we have seen, Marx argues that consciousness is explicitly tied to production. Human production is supposed to act as a mirror that reflects our nature. Thus, the way in which production is performed is critically important.

This idea is not as extreme as it might seem. Think about digging in your garden. If you use a shovel and hoe to dig the earth, and you bend down and plant the seeds by hand, you will find that you'll notice things about the earth, yourself, and your work. You will smell the loam of the earth; you'll feel the consistency of the soil in your hands and on your knees as you kneel; you'll sense the soil, water, and seed as they mix together; and when the plants sprout, you will see your sweat and toil reflected in the ground and new life. But if you use a tractor, it won't be the same; and if you use a computer to guide the tractor as it plows, plants, and harvests, you will be utterly removed from the smells, tastes, and feel of earth, sun, water, and the human body.

Let me give you another illustrative example. The aesthetics of airplane mechanics are generally different than those of symphony conductors. Part of the difference is undoubtedly due to psychological dispositions. But the majority of the differences are due to the kind of work they do. Constantly working on real machines, getting your hands dirty and banged up, and having to exert physical strength and mechanical ingenuity all day, gives a person a particular perspective and cultural disposition. Likewise for a symphony conductor, interpreting a musical score and working to present that interpretation through an orchestra gives the conductor a certain perspective and disposition, as well. We become what we do. Consequently, there are significant social and individual effects when the general means of production change in a society.

Machines of reproduction and schizophrenic culture: Jameson argues that human reality and consciousness was non-problematically represented by the aesthetic of the machine in earlier phases of capitalism. In other words, workers could touch and see the machines that were used to create products. While alienated, they were still
connected to the production process and could, most importantly, also experience the alienating process through their senses. But in postindustrial societies, through multinational capitalism, workers are using machines less and less. Even if they are in a manufacturing sector, the machines are more and more controlled through computers. Those people not in manufacturing today, like the rising service class, use machines of reproduction (movie cameras, video, tape recorders, computers, and so forth) rather than production. Because the machines of late capitalism reproduce knowledge rather than produce it, and because reproduction is always focused more on the medium than the message, Jameson argues that the link from production to signification (culture and meaning) has broken down. Jameson characterizes this breakdown as the schizophrenia of culture and argues that our culture is filled with “free-floating signifiers.”

Let’s back up a minute and try and understand what Jameson is saying. What he and Marx are telling us is that there is, or was, a chain of real relationships from the material world and the human world of ideas. At one time, our ideas and the language we used were embedded in the physical world. Let’s use our garden example again, but place it in a horticultural society (one that lives by planting and growing food). If you are working in that group, your knowledge of farming is firsthand and real. You know how to grow food and the food is there for you when it is done growing. When you talk about growing, the language you use is firsthand, objective, and real. But if we put an owner between the product and the person, there is a break in that continuity. If we insert a tractor and even more equipment in the chain, there are still more breaks in the signification chain. Further, if instead of production equipment, we use machines of reproduction, then there isn’t any objective reference for the signification chain at all. Machines of reproduction don’t produce anything; they only reproduce images or text about something else.

Jameson argues that the schizophrenic nature of culture and the immense size and complexity of the networks of power and control in multinational capitalism produce three distinct features of the postmodern era. One, the cultural system is now dominated by image rather than actual signed reality. These media images, or simulacrum (identical copies of something that never existed), have no depth of meaning; meaning is fleeting and fragmented. Two, there is a consequent weakening of any sense of either social or personal biographic history. In other words, it is becoming increasingly difficult for us to create and maintain consistent narratives about our national or personal identities. And three, postmodern culture is emotionally flat. The further culture is removed from actual social and physical reality, the harder it is to invest with strong emotion.

Besides offering us the provocative idea of postmodernity, these ventures into postmodern theory also give us an opportunity to see how a theorist’s perspective can be used. In other words, it is very possible that a theory can be Marxian but not exactly what Marx himself might say. The theorist’s perspective can be used apart from his or her explicit theory. That’s what Jameson does with Marx. Jameson ends up saying that culture is set loose from its economic base and can have independent effects. This isn’t something that Marx himself said. Nevertheless, Jameson’s theory is Marxian because it originates in a Marxian perspective.
Summary

- Marx’s perspective is created through two central ideas: species-being and the material dialectic. Species-being refers to the unique way in which humans survive as a species—we creatively produce all that we need. The material dialectic is the primary mechanism through which history progresses. There are internal contradictions within every economic system that push society to form new economic systems. The dialectic continues until communism is reached, a system that is in harmony with species-being.

- Every economic system is characterized by the means and relations of production. The means of production in capitalism is owned by the bourgeoisie and generally consists of commodification, industrial production, private property, markets, and money. One of the unique features of capitalism is that it will swallow up all other classes save two: the bourgeoisie and proletariat. This bifurcation of class structure will, in turn, set the stage for class consciousness and economic revolution.

- Capitalism affects every area of human existence. Through it, individuals are alienated from each aspect of species-being and creative production. The work process, the product, other people, and even their own inner being confront the worker as alien objects. As a result, humankind misrecognizes the truth and falls victim to commodity fetish, ideology, and false consciousness. However, because capitalism contains dialectical elements, it will also produce the necessary ingredient for economic revolution: class consciousness. Class consciousness is the result of workers becoming aware that their fate in life is determined primarily by class position. This awareness comes as alienation and exploitation reach high levels and as workers communicate with one another through increasing levels of education, worker concentration in the factory and city, and communication and transportation technologies.

- Jameson’s argument concerning postmodernity is based on Marx’s theory of consciousness: human consciousness is materially based; that is, because of species-being, there is a direct relationship between the method of production and the ideas we have about ourselves and the way we perceive the world. In primitive communism, we had direct and objective knowledge of the world and our selves. Under early capitalism, we suffered from false consciousness and ideology, but this knowledge was still materially grounded in that we were connected to machines of production. In that state, we could have come to a real sense of alienation and class consciousness. However, in postmodernity, the economy is shifting from machines of production to machines of reproduction. With machines of production, there was a connection between culture and the material world. With machines of reproduction, that connection is broken. As a result, cultural signs and symbols are cut loose from their mooring and lose any grounded sense of meaning or reality. From a Marxian point of view, this shift from machines of production to reproduction, from materially grounded ideas to free-floating signifiers, contributes to the prevention of class consciousness.
With Marx, we are lucky in that we have an account of someone who did have a conversation with him. He was interviewed for the *Chicago Tribune* and the article appeared on January 5, 1879. The article contains some personal observations about how Marx looked and acted, and what his home was like. Using your search engine, find the *Chicago Tribune’s* article on Marx and answer the following questions. As you are reading, try to imagine what it would be like to talk with the man who probably had the single greatest impact on world history in the 20th century. What would you ask him if you were there?

- How was Marx treated in Germany and France?
- What personal characteristics of Marx stand out to you?
- What kinds of books did Marx read? What was his breadth of knowledge?
- What was the International Society? What were its beliefs and purposes? Which of the elements in the platform of the International Society have been fulfilled? Are there any that you think ought to be implemented but haven’t yet been? Which do you think are bad ideas? Why?
- What does Marx say about religion?
- What does Marx say about violent revolution?

### Passionate Curiosity

*Seeing the World (using the perspective)*

Each of our theorists has a unique perspective. If we can understand the perspective, then almost everything else in the theory falls into place. Marx’s perspective is one of the most profound, well-thought-out viewpoints we will come across.

- Marx founds his theory on an assumption about human nature. Why is everything we think about human nature more of an assumption than fact? (Notice that Marx builds an argument to convince us of this assumption, but it still isn’t a fact.)
- Evaluate the idea of species-being. Do you agree with Marx’s argument concerning human nature? Are we by nature social and altruistic? If you disagree with Marx, what do you assume about human nature? Also—and this is extremely important—upon what do you base your assumption? Recall that Marx based his assumption on the way humans uniquely exist (creative production). So, if you disagree, what is the basis of your assumptions concerning human nature?