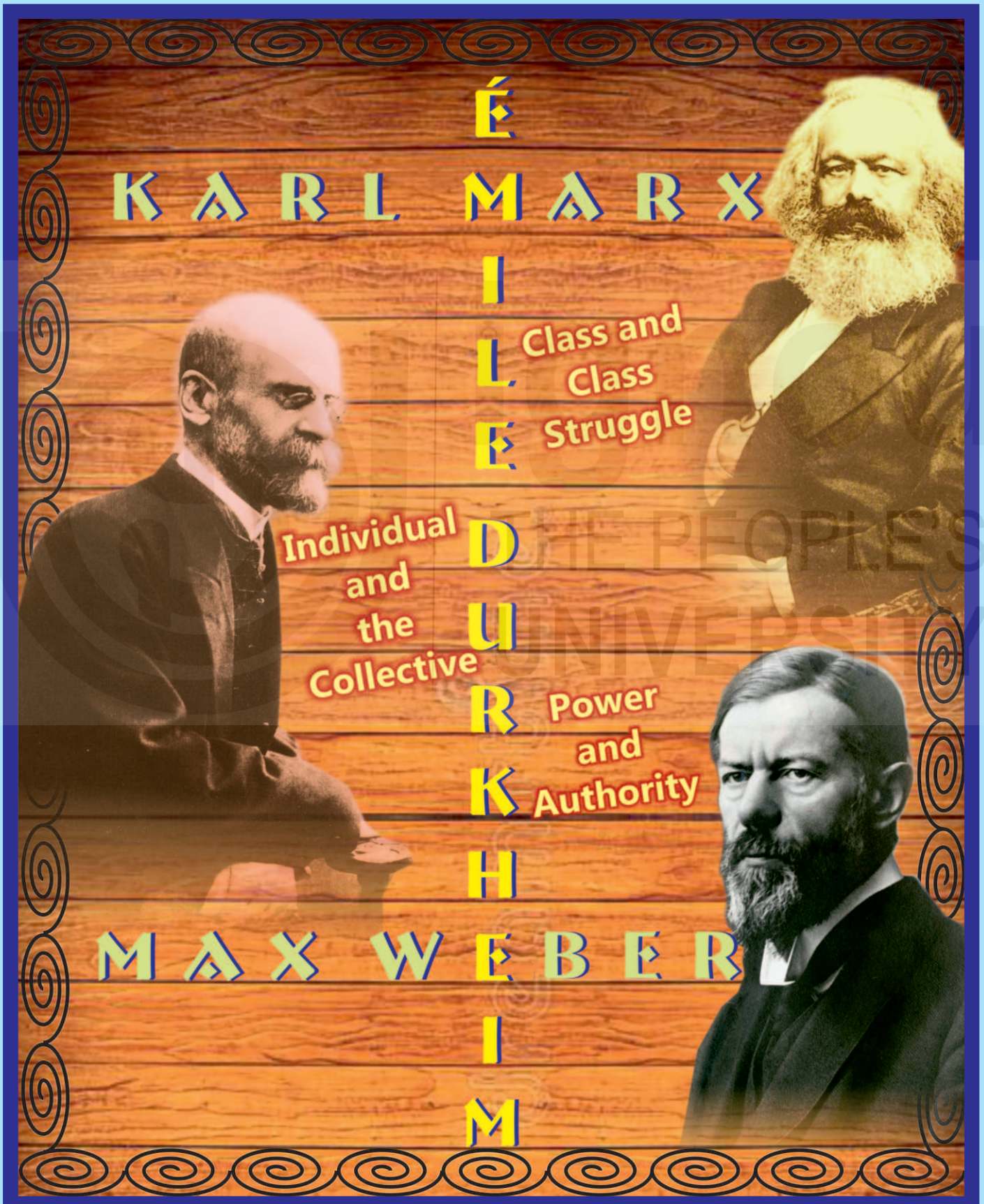




SOCIOLOGICAL THINKERS-1

THE PEOPLE'S
UNIVERSITY



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COURSE INTRODUCTION

Let us begin with three interrelated questions: how does personal life of sociological thinkers influence their thinking and construction of theories? What is sociological theory? What is the purpose of sociological theory? Well, sociological theory comprises a set of ideas which seeks to explain what we see happening around us i.e., nature of social action in different contexts. You might want to ask if sociological theory could explain, for example, some people's practice of showing off an expensive diamond ring. Thorstein Veblen explained such a practice in the framework of the theory of leisure class. This does not mean that there is only one theory for each social phenomenon. The fact is that a single theory can explain multiple phenomena and single phenomenon can be explained by multiple theories. Let us take the example of Marx's theory of capitalism. This theory is often used in discussion on class as also religion. It is also true that single phenomenon can be explained by multiple theories. Let us take the example of division of labour which is explained both by theory of functionalism and capitalism. You will be able to understand how theorists explain social phenomena.

This course on social thinkers introduces to the life and work of three major theorists in the discipline of sociology: Karl Marx, Émile Durkheim, and Max Weber. Additionally, it will enable you to understand the social and political climate that influenced their ideas. One of the main concerns of Marx, Durkheim and Weber was with the effects of the Industrial Revolution. What they encountered predominantly were, among others, issues of division of labour, relations of production, law and property, religion, and class. Not surprising, therefore, their theories stemmed from a close understanding of these issues.

The purpose of this course here is threefold: first, to discuss the central ideas of three theorists who laid the foundation of the Discipline of Sociology; second, to explain how phenomena that we encounter in everyday life can be explained from a theoretical perspective; and third to demonstrate how the same phenomenon can be explained using different theoretical perspectives. The course is divided into three Blocks.

Block 1 comprising four Units focuses on the contribution of Karl Marx to sociological thought. We begin with a Unit which deals with major issues and concerns that influenced Marx's perspective on social reality. You will also get a glimpse of the personal life of Marx which influenced his intellectual life. The next Unit discusses Marx's ideas use value and exchange value. This is followed by his idea on social formation and capitalist mode of production. The last Unit familiarizes you with Marx's notion of class. You will learn about the very basis on which class formation takes place and why classes enter to into conflict with each other.

Block 2 comprising four Units discusses on the contribution of Émile Durkheim to sociological thought. Like the previous one, this Block is divided into four Units of which the first explains the issues and concerns that influenced his perspective on social reality. Second Unit looks into Durkheimian method of understanding of society. He maintained that society can best be understood in terms of social facts and gave a set of rules to comprehend social facts. This particular Unit explains the concept and characteristics of social fact and deliberates on the rules for observation of social facts. Third Unit discusses Durkheim's notions of the individual and collective. We will learn how the individual relates with society. Fourth Unit draws attention to what can be treated as 'normal' and 'pathological'.

Block 3 comprises four Units. The first Unit begins with the contribution of Max Weber to sociological thought. The objective is to demonstrate in what way the social and political climate at that time influenced his sociological perspective. The second Unit focuses on social action and ideal type. It explains Weberian understanding of social action and types of social action. Thereafter, it clarifies Weber's concept of ideal type, explains its characteristics and sheds light on the relevance of the concept of ideal type in understanding social reality. The third Unit explains Weberian understanding of power and authority. You will learn about the important features and types of authority. Fourth Unit discusses Weber's perspective on the relationship between religion and economy.

Block 1

Karl Marx



UNIT 1 PHILOSOPHICAL FOUNDATIONS OF KARL MARX'S WORK*

Structure

- 1.0 Objectives
- 1.1 Introduction
- 1.2 Biographical Sketch of Karl Marx
 - 1.2.1 Early Years
 - 1.2.2 Berlin Days
 - 1.2.3 in Paris
 - 1.2.4 Revolutionary Marx
 - 1.2.5 Exile
- 1.3 Socio-Historical Background
- 1.4 Intellectual Influences
 - 1.4.1 German Philosophy and Idealism
 - 1.4.2 Materialist Perspective
 - 1.4.3 Political Economy Perspective
- 1.5 Central Ideas
 - 1.5.1 Alienation
 - 1.5.2 Class and Relations of Subordination
 - 1.5.3 Means, Relations, Forces and Mode of Production
- 1.6 Let Us Sum Up
- 1.7 References
- 1.8 Answers to Check Your Progress

1.0 OBJECTIVES

After going through this Unit, you should be able to:

- describe biographical details of Karl Marx;
- outline main intellectual ideas and perspectives that influenced his writings;
and
- explain central ideas in his writings.

*Written by Sumit Saurabh Srivastava, Centre for Globalization and Development Studies, University of Allahabad, Prayagraj; Section 1.2 is adapted from IGNOU Course Material: *Sociological Thought* (ESO)13 with minor modifications by Nita Mathur

1.1 INTRODUCTION

Karl Marx was a German philosopher. He wrote on a wide variety of themes including capitalist mode of production, class and class conflict, political economy, alienation and many others that have provided meaningful insights in the disciplines of economics, history, political science and of course sociology. In this Unit we begin with a biographical outline of Karl Marx in order to familiarize you with the social, economic and political environment in which his ideas developed. We then examine the specific intellectual ideas that influenced him. Finally, we will understand some important ideas in his writings.

1.2 BIOGRAPHICAL SKETCH OF KARL MARX

1.2 Biographical Sketch

We can divide the life of Karl Marx into five phases. Let us look at each phase closely.

1.2.1 Early Years

Karl Heinrich Marx was the second child and eldest son of Heinrich and Henrietta Marx. He was born on the 5th May, 1818, in Trier, in the German Rhineland, where his father, Heinrich Marx practised law.

Heinrich Marx belonged to the small but widely dispersed Jewish community of Germany. In the period that Napoleon ruled Germany the Jews had taken advantage of the opening of trades and professions which were previously barred to them. For enjoying the prospects of wider opportunities, many Jewish families had departed from their traditional style of life. In 1828, after Napoleon's defeat, the Congress of Vienna assigned the German Rhineland to the Prussian Kingdom. This meant that Germany was again divided into feudally organized kingdoms and the Jews once more faced racial, political and religious barriers. Some of them could not retrace their path and Karl Marx's father was also one of them. [...] In 1817, one year before the birth of Karl Marx, Heinrich became a member of the Christian Church. The hostile attitude of Karl Marx to religion may well be partly due to the peculiar and embarrassed situation in which such converts sometimes found themselves' (Berlin 1939: 33). [...]

On his father's advice, Karl Marx joined the University of Bonn as a student in the faculty of law. In the autumn of 1836 he was transferred to the University of Berlin. [...]

1.2.2 Berlin Days

Karl Marx's years in the University of Berlin were spent under the impact of Hegelian philosophy. He joined the group known as Young Hegelians. These were also the years of a period of dejection among the German intellectuals. [...] As a student of the faculty of law Karl Marx attended the lectures of Eduard Gans, who was one of Hegel's favourite disciples. We find that Eduard Gans had considerable influence on him. Marx learnt from him the method of theoretical

criticism. Gans showed Marx in jurisprudence the legitimate field for applying and verifying every type of philosophy of history. This led young Marx to try and construct a rival system of Hegelian ideas of positivism. Despite his father's advice to abandon metaphysical speculation, Marx gave up his studies of law and immersed himself in philosophy. [...]

A Cologne publicist, Moses Hess, helped Karl Marx to be invited to write articles for a journal (*Rheinische Zeitung*). Later, Karl Marx became its chief editor. When it became clear to him that in Germany he could not speak and write freely, he decided to emigrate to France. After his marriage in 1843, he left for Paris.

1.2.3 In Paris

In the middle of the nineteenth century, when Karl Marx arrived in Paris, the French capital mirrored the unparalleled phenomenon of socio-economic, political and cultural upheaval in Europe. As far as Karl Marx was concerned, he had uppermost in his mind one question. What was the reason for the failure of the French Revolution? Do you know what Karl Marx did to find answer to this question?

He studied historical records of the revolution and huge body of works written in France on this and other associated subjects. Can you believe that this hard working young man of 25 years finished the gigantic exercise within one year! He read for night and days just as he had done when he joined the group of Young Hegelians and wanted to know all about Hegelianism. Marx's reading of the economists from France and England clarified for him a great deal of issues related to Hegelianism. He began comparing the socio-economic conditions of France and Germany. Though influenced by French socialist writers and English economists, Karl Marx was not any the less critical of their scholarship. According to Karl Marx, they lacked a sense of history. He thought that their scholarship lacked seriousness and integrity.

Interestingly, although very critical of Hegelianism, Karl Marx accepted Hegel's view of the structure. In other words he believed in the fact of formal relations between the elements of the process of human history. But, his understanding of the elements themselves was based on his study of the views of the French thinker Saint Simon and his disciples. This is how the critique of Hegel provided Karl Marx a basis for creating a new outlook and a plan of action. This was also the time when he met in Paris a revolutionary by the name of Friedrich Engels, who was a German radical and son of cotton manufacturer. In connection with publication of economic articles for Marx's Journal, the two had met in the autumn of 1844 and thus began a long lasting phase of friend and partnership between them. Karl Marx who wrote in an obscure and clumsy manner, benefitted by collaborating with Engels who had a remarkable capacity 'for sifting, assessing and perceiving the practical applicability of the discoveries of others' (Berlin 1939: 100). Not only this Engels provided Marx with the feeling

of security which the latter lacked. It is said that on his part, Karl Marx gave his friend an affection which he gave only to his wife and children. [...]

Marx's brief but very productive spell in Paris ended in the beginning of 1845 when he was expelled from Paris. Comments against the ruling Prussian King had appeared in the socialist journal, *Vorwarts* and the Prussian authorities had demanded expulsion of the entire group connected with these activities.

Karl Marx was one of them. He left Paris for Brussels with his wife and one-year-old daughter. He was joined in Brussels by his friend Engels. While in touch with the various German communist workers' organizations, with branches in various European cities, Karl Marx decided to set up an international organization of workers. This was the beginning of the period when the scholar Marx turned into a visionary of revolution.

1.2.4 Revolutionary Marx

Working with the Communist League, a federation of workers, Karl Marx became an organizer and leader of a revolutionary party. In 1847, the London branch of the Communist League entrusted him with writing of a document which would spell aims and objectives of the party. Karl Marx welcomed this idea and produced the document early in 1848. Just a few weeks before the Paris revolution of 1848, this document was published. It was called the Manifesto of the Communist Party (1848). [...] As a result of producing the Manifesto of the Communist Party, Karl Marx and his family were expelled from Belgium and its territory. He was, on the other hand, invited back to Paris by the new French Government. Long awaited revolution had broken out in Paris and Marx immediately left for the French capital. Marx was generally not very much taken in by this revolutionary and he once again left Paris and went to Cologne to find out what he could do to propagate his idea in his native Rhineland.

He started a new journal and named it *The New Rheinische Zeitung* after his first journal. Articles in this journal were read avidly by the public. But soon, owing to rather radical position taken by Karl Marx regarding the Prussian Government, the paper was suppressed and its last issue came out in red letters. For his article in this issue, Marx was arrested for sedition and tried in Cologne court. Here, during his trial, Karl Marx delivered a speech on socio-economic conditions in Germany and other countries. The jury thanked him for an enlightened lecture and acquitted him. All the same the Government had already taken away his citizenship and therefore he was expelled from Rhineland in July 1849. As he had very few alternative places to go to, he went once more to Paris where the French Government ordered him to either leave France or to retire to the obscurity.

1.2.5 Exile

With the help of funds collected by his friends, Karl Marx bought his fare to England and arrived in London in August 1849. His family joined him after a month. In November, Engels also arrived in London. Do you know that Marx

expected to be in England for only a few weeks? But, in fact, he lived there until his death in 1883.

Because England in those days was not much affected by goings-on in Europe, it was possible for Karl Marx to continue to live there without problems. He was, on the other hand, isolated and cut off from the ferment of intellectual and political activity. With his family and close friends, he led a life of relative inactivity and material poverty. This forced inactive life, of course, helped him to develop as a thinker. [...]

In 1864, when Worker's International was formed in London, Marx joined its executive committee as the representative of the German artisans in London. Marx, in fact, took charge of the organization and delivered its Inaugural Address, which contained a socio-economic survey of the working class from 1848 to 1864. The International grew fast and Marx controlled its activities from London. While involved in these pre-occupations, Karl Marx published in 1867 the first volume of *Das Kapital*, his magnum opus. The second and third volumes of this treatise were edited after Marx's death by Friedrich Engels. *Das Kapital* created a stir and it was soon translated into French, English, Russian and Italian. Sure enough, now we have its translations available in many of the regional languages of India. [...]

Marx's writings and speeches of thirty years were mainly directed against the country which eventually welcomed his ideas and turned him into the greatest hero of modern times. This country was Russia. Russians visited Karl Marx in London. He welcomed them and talked about his mission in life. The mission was to overthrow capitalist society. He inspired the Russian revolutionaries. Himself he spent his days in writing and making notes. After a prolonged illness of lungs, his health failed and he died in his sleep on 14th March, 1883 (excerpted from Biographical Sketch—Karl Heinrich Marx (1818-83), ESO 13: 5-9).

1.3 SOCIO-HISTORICAL BACKGROUND

The 18th and 19th centuries witnessed wide-sweeping economic changes across Europe. These changes particularly affected England. Most of the changes were taking place in the economic sphere due to the introduction of an industrial economy. With the coming of industrial economy, the earlier form of feudal society underwent significant changes. There was a shift from the feudalism to capitalism. There was a stream of migration from the rural hinterlands to the emerging urban, industrial and modern centres like Manchester, Liverpool etc.

Simultaneously, there was decline in the influence of trade guilds. Such decline gave more space to the capitalist expansion in the economy of that time. The aforesaid variables deeply impacted the European society. Along with it, the process of rapid industrialization and horrible working situations of the industrial workers (working class) led to wide spread poverty and social distress among them. In a way, it all culminated in the social revolution in France and throughout

Europe. These specific historic conditions influenced Marx very much and gradually his increasing engagement with economic questions and economic problems was articulated in his numerous writings. An important influence on him was his reading of Engels's *The Condition of the Working Class in England* in 1844 which made him aware of the nature and extent of misery of industrial workers. Subsequently his engagement with the workers' movement became more and more passionate. Marx and Engels developed their philosophy of communism and became the intellectual leaders of the working-class movement.

As you learnt in the previous section, in 1847 Marx was asked to write the Manifesto of a society made up of revolutionary German workers living in London. Marx and Engels renamed the group the Communist League and began writing a manifesto summarizing the doctrines of the League. Marx wrote *The Communist Manifesto* in January 1848 in which the historic statement was made:

'The proletarians have nothing to lose but their chains. They have a world to win. Workers of the world, unite!' The emergence and gradual consolidation of industrial capitalism made him more aware and articulate towards critiquing the exploitative system. (excerpted from *Biographical Sketch – Karl Heinrich Marx* (1818-83), ESO 13: 5-9).

1.4 INTELLECTUAL INFLUENCES

Marx's work can be appropriately understood in light of the intellectual context from which it emerged. Let us now look at the intellectual ideas that influenced Marx.

1.4.1 German Philosophy and Idealism

In early years of studentship, Marx was largely influenced by the German Philosophy and Idealism of his days. More specifically, influence of Georg Wilhelm Friedrich Hegel and Ludwig Feuerbach is noticeable in his writings. Hegel's ideas can be located in the broad framework of idealist philosophy. In a general sense, idealist philosophy lays emphasis on ideas i.e., reason for the understanding of social change. Further, Hegel explains dialectics in terms of three elements: thesis, antithesis and synthesis. Thesis is the dominant form of ideas prevalent in society at any given point of time which are perceived to be 'true'. Antithesis is the contrary set of ideas which are formulated over a period of time. Over time, the thesis and antithesis reconcile in the form of synthesis. In due course, this synthesis serves as thesis. Opposing the new thesis emerges new antithesis and subsequently new synthesis arises. Seen in this way, progress in history happens by way of series of clashes between an idea (i.e., thesis) and its contradiction (i.e., antithesis) leading to the rise of a new idea (i.e., synthesis).

Marx accepted Hegel's idea of dialectics but did not agree with the emphasis on ideas. Instead of ideas, Marx brought in material forces and developed the idea of dialectical materialism. You will read more about dialectical materialism in Unit 2. He examined the dialectical relationship between capitalists and the proletariat. Also, he traced the dialectical history of changes in society from

primitive through feudal to capitalist society. Further, dialectical approach takes a view that various aspects of society are in constant conflict with each other. Following this understanding, Marx saw the contradiction between capitalists and the proletariat. He maintained that while the very basis of capitalism is exploitation of the working class. This exploitation will create conditions for the working class to revolt and overthrow capitalism itself.

Another set of writings which influenced Marx came from Ludwig Feuerbach who was a German Philosopher. While Hegel believed that 'real man' emanates from the divine, Feuerbach argued that 'real man' is one living in the 'real, material world'. According to Feuerbach, human beings create an image of God to which they ascribe ideal qualities that they cannot attain. Human beings strive to be like God but this is not possible. In the process, however, they are not able to appreciate human qualities and in this sense suffer from religious alienation. What attracted Marx to Feuerbach's ideas was the emphasis on material bases of religion. Marx, however, felt that Feuerbach should have related religious alienation with economic activity. Marx felt that alienation originated from social and economic activities of human beings. You will learn more about the concept of alienation in section 1.5.1. Marx elaborated it in his own materialist perspective and stated that religion is the handiwork of those who are rich class i.e. own the means of production and politically powerful. Religion in a way masks the everyday pain and suffering and justifies the same on account of religious ideals.

Check Your Progress 1

- 1) Name two scholars who influenced Karl Marx's ideas.

.....

.....

.....

- 2) What is the main focus of dialectical approach? Use the space below to write your answer.

.....

.....

.....

1.4.2 Materialist Perspective

The materialist perspective is at the centre of Marx's analysis of society. You may be curious to know what materialism is. Let us refer to Box 1.1 to understand the meaning of materialism.

Box 1.1 Materialism

"Materialism seeks the scientific explanations of things, including even religion. The idea of materialism may be opposed to the concept of idealism. Idealism refers to a theory that ultimate reality lies in a realm of transcending phenomena.

Materialism, on the other hand, contends that everything, that exists, depends upon matter. We can speak of three kinds of materialism, namely, philosophical materialism, scientific materialism and historical materialism. Without going into terminological details of the first two kinds, we clarify that historical materialism emphasises the fundamental and causal role of production of material conditions in the development of human history.

Marx traced historical events in the light of materialistic understanding of reality”. (ESO 13, Block 2: 16)

According to Marx, the structure and development of society is conditioned by the material conditions or economic factors of that society. The notion of Materialism as given by Marx can be compared and contrasted with Idealism which is much associated with Hegel. While, Idealism refers to a theory that ultimate reality can be understood and interpreted through ideas, Materialism argues that everything, that exists, depends upon matter. It studies the real conditions of human existence. One can thus see that both these perspectives are bi-polar in nature. One gives importance to the idea and the other to the material conditions of existence. Marx’s general ideas about society are known as his theory of historical materialism. Let us refer to Box 1.2 to learn little more about historical materialism.

Box 1.2 Historical Materialism

“Marx’s general ideas about society are known as his theory of historical materialism. Materialism is the basis of his sociological thought because, for Marx, material conditions or economic factors affect the structure and development of society. His theory is that material conditions essentially comprise technological means of production and human society is formed by the forces and relations of production. [...] Here, let us tell you why Marx’s theory of society, i.e., historical materialism is historical. It is historical because Marx has traced the evolution of human societies from one stage to another. It is called materialistic because Marx has interpreted the evolution of societies in terms of their material or economic bases. [...]

According to Friedrich Engels the theory of historical materialism was discovered by Karl Marx, but Marx thought it was Friedrich Engels who had conceived the materialist formulation of history independently” (ESO 13, Block 2:12-13)

Major tenets of historical materialism are: (i) economic structure of society is the most important one; (ii) economy determines politics and culture in society; and (iii) instead of ideas, economic structure determines political and legal superstructure. Historical materialism is a materialist interpretation of social, cultural and political phenomena. His theory of historical materialism is both historical and material in nature. It is historical because Marx has traced the evolution of human societies from one stage to another. It is materialistic because he has interpreted the evolution of societies in terms of changes in their material

or economic bases. In evolutionary perspective, the history of society is seen through the successive stages of evolution.

Marx outlined his theory of historical materialism in 'Preface' to A contribution to the Critique of Political Economy stating, 'It is not the consciousness of men, therefore, that determines their existence, but instead their social existence determines their consciousness.' The society is seen as a structure having at its base the economy - the infrastructure so to speak. This economic infrastructure of society is made of forces and relations of production. You will read about these concepts in section 1.5.3. The superstructure of society is based on relations of production. Other aspects of society as history, politics, law, religion, education are influenced by the economic structure. Historical materialism is also the cornerstone of Marx's understanding of the process of social change. Over time, forces of production evolve. When this happens, they contradict existing relations of production. When the contradiction intensifies, the existing mode of production and its superstructure breaks down. New relations of production that match with forces of production emerge. This dialectic between forces of production and relations of production lies at the root of societal development that explains history of societies. Thus, conflict is viewed as a creative force that triggers progress.

Marx described stages of human history in terms of the four modes of production: the Asiatic, Ancient, Feudal and Capitalist. According to him, ancient, feudal and capitalist modes of production followed each other one after the other in western societies. Asiatic mode of production is a feature of those societies in which ownership of land is communal, kinship relations predominate, and production process and labour are controlled by the State. He predicted that capitalist mode of production will be followed by socialism/communism. Ownership over means of production in each mode of production lies in the hands of one class. This determines the relations of production and class relations that emerge from production process. Ancient mode of production is characterized by slavery, feudal mode of production is characterized by serfdom and capitalist (bourgeois) mode of production is characterized by wage earning.

Asiatic mode of production is characterized by the subordination of all people to the state or the state bureaucracy. You will read about modes of production in section 1.5.3. Can Marx's historical materialism be equated with economic determinism? Let us refer to Box 1.3 to find out.

Box 1.3 Historical Materialism is not Economic Determinism

"It is possible that you may consider Marx as a proponent of economic determinism or the view that economic conditions determine the development of society. But you will here see how historical materialism is different from economic determinism. Marx recognised that without culture there can be no production possible. For him, mode of production includes social relations of production which are relations of domination and subordination into which men and women are born or involuntarily enter. The reproduction both of life and of

the material means of life cannot be understood without turning to the culture, norms and the rituals of the working people over whom the rulers rule. An understanding of working class culture contributes to an understanding of the mode of production.

Class is a category that describes people in relationships over time, and the ways in which they become conscious of these relationships. It also describes the ways in which they separate, unite, enter into struggle, form institutions and transmit values in class ways. Class is an 'economic' and also a 'cultural' formation. It is impossible to reduce class into a pure economic category". (ESO 13, Block 2:21-22)

1.4.3 Political Economy Perspective

Before discussing how Marx was influenced by the political economy perspective, let us understand what is meant by 'political economy'. In its simplest sense, political economy refers to the interface between politics and economy. In this sense, politics and economics are treated as inseparable from each other. Political economy addresses the question: how do politics and policies influence economic outcomes (e.g., economic growth, trade, employment, income inequality across different sections of society and regions)?

Engels explained political economy in terms of laws that govern production and exchange of 'material means of subsistence'. Marx, however, did not discuss the concept of political economy but developed a critique of it. Giddens (1998) mentions two main criticisms of political economy that Marx proposes. The first one attacks the basic assumption that conditions of production that are characteristic of capitalism can be found in all forms of economy. Marx's argues that capitalism is not the only form of productive system. As you have seen in the previous section, there have been other forms of productive systems before capitalism and that other forms of productive systems may emerge after capitalism. The second criticism attacks economists' practice of reducing everything to economic value and economic relations. For them, 'commodities', 'prices' etc. are independent of human intervention. In the political economy framework, those people who are not engaged in the production process (like the unemployed, beggars etc.) do not exist. Reduction of both commodities and people to economic categories is not agreeable. Class division in society is conveniently ignored by economists. The fact, however, is that there is perpetual conflict between working class and the capitalist class over wages and profit.

Marx argued that major share of the profits in capitalist mode of production is taken away by capitalists (i.e., those who own the land and capital). The workers lack control over both: the production process and the commodities they produce. They are not able to relate with what they produce. This is what Marx referred to as 'alienation' of the workers.

According to Marx, every commodity has to kinds of value attached to it 'use-value' and 'exchange-value'. Use-value of the commodity is in its consumption and exchange value denotes the value of a product when it is exchanged with the

other products. Labour Theory of Value according to both Adam Smith and David Ricardo suggests that it is the human labour power which makes any commodity valuable in terms of its use and exchange value. This proposition influenced Marx to a great extent which he subsequently modified to explain the emergence of surplus value and surplus labour. For him, the production of any commodity involves costs of human labour, raw material and machinery which are borne by the owner of the industry or factory / the capitalist. Capitalists buy human labour and thus produce and sell the commodity. In order to have surplus value which is the source of profit, the capitalist maximizes the production and tries to keep down the human labour cost. In this way, the capitalist gains surplus value which though is an economic concept, yet is configured by the relation of domination and sub-ordination among the capitalist and the industrial worker. It is in such a heightened sense of exploitation and appropriation of human labour that first the sense of alienation enters in to the worker which effectively channeled gives way to the social revolution. Thus we see that the pure economic categories like 'use-value' and 'exchange-value' and human labour cost are modified by Marx within the framework of political economy so as to explain the rise of capitalism.

Check Your Progress 2

- 1) What are the major tenets of historical materialism? Use the space below to write your answer.
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.....
.....
- 2) What is meant by political economy? Use the space below to write your answer.
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.....

1.5 CENTRAL IDEAS

Let us discuss some of the important ideas in Marx's writings.

1.5.1 Alienation

The concept of alienation used by Marx in his writings is derived from Hegel. In fact, according to Hegel, Idea was the Universal Absolute from which man was alienated i.e., estranged. In simple words, according to Hegel, we see our own

ideas and creations as external and alien to us. In the long run, we overcome this alienation. Feuerbach did not agree with Hegel that Idea was more important than man in the metaphysical sense. According to Feuerbach, man projected the best attributes that he can think of in an entity called 'god'. This externalized, objectified creation of man i.e., god represents man as alienated from his own self. While Marx accepted Hegel's notion of alienation, he rejected the idea that alienation has to do with consciousness alone. For Marx, alienation involves a sense of detachment of workers from their own labour and the objects they create. Consider the case of a carpenter who makes a chair but cannot use it for himself. The chair which he has made himself is for sale but not for his own use.

In a shoe factory, for example, a worker produces say only the heel while someone else produces the upper part and yet another worker assembles all the parts and forms the shoe. The work of each one is mechanical and not creative. According to Marx, alienation takes place in four ways: (i) workers lose control over what they produce; (ii) workers lose control over their own work activity since they sell their labour for wages and treat the productive process only as a means of subsistence; (iii) workers have to produce mechanically with no creativity or mental engagement; and (iv) private labour of workers makes them self-centered and individualistic, they compete with each other. This estranges them from each other.

1.5.2 Class and Relations of Subordination

The notion of class is central in the writings of Marxist analysis of society. According to him a social class occupies a fixed place in the production process and thus in the relations of production. According to Marx, in the beginning of the human history, as the land was collectively owned or was not owned by any one person or a group, it was seen as a classless society. One explanation is that class emerges as the corollary of property and ownership of property. Marx in *Capital* (1894) distinguished three classes, related to the three sources of income: (a) owners of simple labour power or labourers whose main source of income is labour; (b) owners of capital or capitalists whose main source of income is profit or surplus value; and (c) landowners whose main source of income is ground rent. It needs to be mentioned that in two of Marx's writings *Revolution and Counter-Revolution in Germany* and *The Class Struggle in France*, we find two different class structures.

However, the other explanation suggests that with the ownership of the means of production, there emerges two classes; one who owns it i.e. 'Haves' (bourgeoisie/capitalists who appropriate surplus value) and those who do not own it, i.e. 'Have nots' (proletariats who possess only their labour power). The latter in order to survive often submits to the former and thus theirs is a relation marked by superordination and subordination - oppressors and oppressed. Bourgeoisie is the class of capitalists who control means of production. One can also look in to 'Class in itself' notion which means that all those who are sharing the same relationship to the means of production comprise a class; and 'Class for itself' where the

members of a class are aware of their exploitative situation and come together to resolve it through revolution.

Outlining the relations of subordination, Marx notes that in every historical stage of the human society, we find the presence of two antagonistic classes i.e. Masters and Slaves in Ancient society, Lords and Serfs in Feudal society and capitalist and industrial worker in capitalist society. However, he sees class as a unique feature of capitalist societies because it is here that exploitation reaches its peak and through revolution waged by class conflict and class struggle the capitalism is overthrown. The cause of exploitation is the intense desire of the capitalist for profit making in form of surplus value. Finally, capitalist mode of production will be replaced by communism in which abolition of private property, self-alienation are abolished. You will learn more about Marx's notion of class and class struggle in Unit 3.

1.5.3 Means, Relations, Forces and Mode of Production

By 'means of production' Marx refers to things that are used for production (e.g., land, raw material, technology etc.) . Now, there is a class of people who own the means of production but it is not possible to produce anything with only tools, machinery, and technology. For production process all these have to be put to use. When this happens, people have to interact with each other. The social relations that they enter into for production are called 'relations of production'. Relations of production include both: relations between owners of means of production and workers; and relations among workers themselves. Relations of production between owners and workers are characterized by dominance and exploitation while those among workers are characterized by cooperation. The way commodities are produced is referred to as 'forces of production'. This is a combination of means of production and labour power. In simple words, forces of production refers to all the factors that contribute to the process of material production directly. According to Marx, each stage of social history of the society is differentiated with each other by how, or by what means, the members of society produce the material goods for their survival and thus fulfilling their needs. Each mode of production associated with a specific stage in the human history has its specific relations of production. As explained in section 1.4.2, Marx identified four modes of production: the Asiatic, Ancient, Feudal and Capitalist. Let us understand each mode of production in detail.

The Asiatic mode of production is feature of primitive communities in which ownership of land is collectively owned. Here the sense of individual 'ownership' is absent. As a result, the notion of property or private property is also absent. In the absence of both, this is called as a 'classless' society.

In the Ancient Mode of Production, slavery is seen as the basis of the process of production. Herein for the first time in the human history, that we come across two distinct and opposing classes i.e. Masters and the Slaves. One can see the emergence of large scale agricultural practice as its reason. The relation of

masters to slaves is considered as the very essence of slavery as it is exploitative in nature and Master appropriates the labour of the slaves.

Feudal Mode of Production is marked by two mutually antagonistic classes' i.e. landed nobility feudal lords and their tenants or 'serfs'. As Serfs were legally not free they were deprived of property rights. In order to survive, they used to work on the landed properties of their feudal lords. The feudal lords appropriated land rent from their serfs.

Capitalist Mode of Production is a feature of the industrial era. There are the two antagonistic classes: capitalist or the bourgeoisie and the worker/ labourer or the proletariat. As a mode of production, capitalism first emerged in Europe. Here capital is the dominant means of production. Subsequently, the world witnessed the rapid growth of technology and rise of capitalist economies. The means of production is in the absolute control of the capitalist who exploits the labour of the proletariat for profit making. In Marx's view, capitalism will be eventually replaced by communism.

1.6 LET US SUM UP

The Unit discussed key influences on Marx's writings and discussed in brief his central ideas. One can see that his idea on understanding history as the continuous line of development marked by the successive evolutionary stages of human society is very much influenced by the evolutionary thoughts of that time. Similarly the dialectics of idealism by Hegel was modified and 'turned upside down' by Marx when he applied his dialectics of materialism. The core values of thesis, antithesis and synthesis remained the same but their inherent nature change from Hegel's progress of ideas to Marx's progress of means of production thus leading to progress of human history. The labour theory of value given by classical economists like Adam Smith and David Ricardo were influential in Marxist writings on use value, exchange value and surplus value.

Along with class and relations of subordination, the central ideas of Marx included means of production, relations of production, mode of production and forces of production which in the ultimate analysis provide a picture of Capitalism. Needless to say, as a philosopher and economist of the times of revolutions of 18th and 19th centuries, Marx's writings still resonate in the contemporary times.

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1.8 ANSWERS TO CHECK YOUR PROGRESS

Check Your Progress 1

- 1) Georg Wilhelm Friedrich Hegel and Ludwig Feuerbach
- 2) The main focus of dialectical approach is on (a) relationships between these components; and (b) totality of social relations and the relation of this totality to those components. The dialectical approach is also concerned with how social phenomena exist in a dialectical relationship to one another across space and time.

Check Your Progress 2

- 1) Major tenets of historical materialism are: (a) economic structure of society is the most important one; (b) economy determines politics and culture in society; and (c) instead of ideas, economic structure determines political and legal superstructure.
- 2) Political economy explains how politics and economics influence each other. Political economy addresses the question: how do politics and policies influence economic outcomes (e.g., economic growth, trade, employment, income inequality across different sections of society and regions).

UNIT 2 USE VALUE AND EXCHANGE VALUE*

Structure

- 2.0 Objectives
- 2.1 Introduction
- 2.2 Commodity
- 2.3 Use Value of Commodities
- 2.4 Exchange Value of Commodities
- 2.5 The Origin of Value and Value Form
- 2.6 Fetishism of Commodities
- 2.7 Circulation of Commodities
- 2.8 Theory of Surplus Value
- 2.9 Let Us Sum Up
- 2.10 References
- 2.11 Answers to Check Your Progress

2.0 OBJECTIVES

After going through the Unit, you will be able to:

- explain the concept of commodity in a capitalist society;
- discuss the changes in social relations with the development of exchange relations in capitalist societies;
- describe the impact of commodity fetishism on relationship among individuals; and
- outline Marx's theory of surplus value.

2.1 INTRODUCTION

Values refer to the approved or desirable beliefs held by individuals in a society or culture. Different individuals may value different beliefs for instance some individuals may value sharing while others may value individualism. Values may vary in societies, cultures and time periods. Individuals have always valued certain beliefs or ideas since ancient times.

When Karl Marx analyses value he is looking at how value is seen in relation to 'commodities' subjected to exchange with the emergence of capitalist society. Karl Marx looks at value in economic terms through the concept of commodities which embody both 'use value' and 'exchange value'. Marx does

*written by Charu Sawhney, Independent Researcher, New Delhi

not look at value in terms of immaterial beliefs but in terms of a tangible thing as a ‘commodity.’

While Marx was in London in 1849 he devoted time to study economics and wrote *Capital* in 1867. The chapter on ‘Commodities’ is the first chapter of *Das Capital* Volume One written by Karl Marx. This chapter undertakes an examination of the concept of commodity in a capitalist society and also its related factors as use value and exchange value. Marx’s analysis of commodity is a critique of the writings of political economists as Adam Smith and David Ricardo. Ricardo’s writings largely shaped England’s economic policies. Through an understanding of the concept of commodity Marx critiques the economic principles of capitalist society.

2.2 COMMODITY

Marx examined the concept of commodity in a capitalist society as an economic product which was an outcome of a system of social relations. Also a commodity is subjected to buying and selling as the market develops in capitalist society. There is an immense accumulation of commodities in societies with capitalist mode of production. A single commodity is the basic unit of a capitalist society. A commodity is a thing outside of the human beings and satisfies human needs. There are various examples of commodities as shoes, dress, bread, butter. Diverse commodities satisfy diverse wants. A commodity displays both quantity and quality. The value of a commodity is determined by the amount of labour socially necessary or socially necessary labour time required in producing it e.g., diamonds are more valuable than other commodities because they are rare to find on Earth’s surface and diamonds also require more labour time to produce them. The two factors associated with a commodity in a capitalist society are use value and exchange value. Similarly, the labour that is embodied in a commodity also displays the two fold character that is useful labour and abstract labour.

2.3 USE VALUE OF COMMODITIES

Commodities only have use value and value of a commodity is created when useful labour in the abstract is embodied in it. The use value of commodities according to Marx consists of two elements that are matter and labour. The use value of a commodity refers to the utility of a commodity or human need that a particular commodity fulfils. Use value refers to the ability of a commodity to render ‘a particular service to an individual’ (Morrison 1995: 60) e.g., shoes protect the feet, dress clothes the body, and bread and butter fulfils the need for hunger. Also every commodity fulfils a particular need which cannot be fulfilled by other commodity. This is because the use of a commodity is determined by the physical properties and also their quality.

A thing can be useful without it being a commodity to be bought and sold in the market e.g., air, water, soil etc. (Calhoun, Moody, Pfaff, Schmidt, and Virk 2002: 47). A thing can have use value, be useful and a product of labour without it being a commodity e.g., A farmer raises agricultural produce for his family’s

subsistence produces use value and not commodities. In order to produce a commodity an individual must expend useful labour on a thing, produce it for others and also subject it to exchange. A commodity is therefore produced when not only use value but social use value is produced as in producing value for others (Calhoun, Moody, Pfaff, Schmidt, and Virk 2002: 47). Value is not found in a commodity. If a thing that is produced is useless it does not have any value and the labour that is expended on it is useless.

Useful labour creates simple use values. Commodities such as linen and coat both have distinctive use values. Useful labour and production for subsistence has happened for time immemorial. Only in capitalist society where there is exchange it takes the form of commodity. In a capitalist society useful labour is transformed into a commodity. In feudal society or tribal society there is no system of exchange and useful labour does not take the form of commodity. Useful labour signifies the capacity of human labour to engage in productive activity and create simple use values in a commodity. Both linen and coat are commodities which are a consequence of productive activities geared toward a definite aim and employing certain means of production. There is a qualitative distinction between the labour, skills and abilities that are required to produce both linen and coat i.e. in activities such as both weaving and tailoring. Useful labour is qualitatively distinct and produces different utilities in different commodities. Only when useful labour and not simply labour is spent on a thing that use value is created in a commodity.

2.4 EXCHANGE VALUE OF COMMODITIES

In a feudal society production is for use and consumption. In a feudal society things only have use value. Exchange value emerges in developed economies as capitalist society where commodities are bought and sold in the market. Exchange value is represented as the ability of definite quantitative proportion of a commodity to be represented in the value of a quantitative proportion of another commodity. For example one kg of tea can be represented in the value of 4 kg of rice. Therefore a common element is found between two different commodities and their values are commensurable in exchange. What emerges is a 'value in exchange' (Morrisoon 1995:61). As commodities are represented by values in exchange their use value becomes insignificant. A universal ground is found in all commodities which is represented by quantitative measures only. This is because one commodity is now replaceable with another. Also in capitalist societies when we speak of value we speak of value in the abstract in how a quantitative proportion of one commodity can be represented through an equation and in relation to the value of a quantitative proportion of another commodity. Also exchange value shapes all social relations in capitalist societies. Exchange value of a commodity is accidental and changes with time and place. Marx believed that in reality commodities are not comparable as each commodity has a distinct quality and fulfils a unique function. Marx critiqued that for

commodities to be commensurable in exchange all useful distinctions between different kinds of commodities are eliminated.

There are three consequences of exchange of commodities. Firstly, when commodities are subjected to exchange it is abstracted from their use. A common ground is established to determine the value of commodities on the basis of quantitative measures. In exchange therefore qualitative distinction between commodities and their use values recedes to the background. Secondly exchange in capitalist production leads to the elimination of distinction between different kinds of labour that is expended in different commodities. Marx believed that the skills and abilities of a coat maker who makes a coat is different from the skills and abilities of a shoemaker who makes shoes. He believed that different kinds of labour produce different use values. Both shoemaker and coat maker are paid wages according to the labour time required to make shoes and coats. Therefore the distinct labours of the shoemaker and the coat maker are equated quantitatively according to the labour time required to produce shoes and coats respectively. The quantity of labour is measured by its duration, that is, its labour time. The third consequence of the exchange value is its impact on social relations. Marx held that in contrast to earlier societies where individuals are valuable in themselves, in capitalist societies all relationships are subject to buying and selling. Therefore the value of things is determined by their ability to enter the market. For example, the relationship between a capitalist and a worker is determined by the exchange value of the worker's labour. The worker is paid wages. This wage is a price of the worker's labour. In a capitalist society the capitalist exploits the worker as the capitalist partakes in the exchange of commodities in the market. The worker on the other hand sells his labour power, that is his capacity to do work, and creates value in production. The worker receives only wages for his maintenance. Such wages are less than the value the worker creates; therefore the worker is exploited.

Political economists David Ricardo and Adam Smith visualized that there is only one kind of labour that is spent on a commodity. Marx held that there is a 'dual character of labour' that is embedded in a commodity. The two kinds of labour that are expended on a commodity are useful labour and abstract labour. Marx questions as to how the values of coat and linen are different in capitalist society. In other words, if coat and linen embody simple use values and are products of qualitatively distinctive labour how is their exchange value different. This is because in capitalist society only the physiological expenditure of energy on a commodity is taken into account. There is a shift from the qualitative distinction between different kinds of labour, skills and abilities, aims of useful labour to a quantitative measure of physiological expenditure of energy. This change to a quantitative measure leads to an abstraction from useful labour as there is a focus on something comparable in different kinds of useful labour. Abstract labour is there only in capitalist societies as it is measured in terms of duration of labour time. Therefore the coat costs twice as much as linen as greater duration of labour time has gone into creating it. On the other hand the value of useful labour gone

into creating coat and linen is qualitatively distinct and the labour embodied in both of them is equally valuable. There is a generalisation from the useful labour that is expended on a commodity and it is known as abstract labour which forms the basis of exchange value of commodities.

2.5 THE ORIGIN OF VALUE AND VALUE FORM

Adam Smith and David Ricardo held that commodities are valuable because labour is embedded in commodities. Marx was influenced by Smith's and Ricardo's thinking and he critiqued it further. Marx analyses how value becomes essentially associated with a commodity and how is the value of one commodity expressed in relation to another. He holds that it has not been proved by any chemist that a commodity has a substance which is a source of its value. Marx holds that the value of a commodity is not an inborn part of a commodity. Value emerges because of a system of social relations in which a commodity is seen in relation to other commodities and a commodity is compared to other commodity. This aspect of a commodity lies hidden as a 'value form'. Value Form is not the same as exchange value. The value of a commodity is determined in relation to another commodity in a capitalist society (Morrison: 1995, 69). According to Marx the common substance which emerges when commodities are subjected to exchange is their value. The value of a commodity is determined by its relation to other commodities and this is relative value (Morrison 1995: 70). Value of a commodity emerges when relative and equivalent forms of value confront each other and enter into a comparison. According to Alan Carling what Marx implied is that a commodity as linen does not know its value until it is reflected in the mirror of the coat, until it sees itself as a coat (Morrison 1995: 71). The first commodity that is linen plays an active role is the relative form of value while the second commodity the coat plays a passive role and represents the equivalent form of value of linen. These expressions of value are opposed to one another yet the two forms of value can swap with each other and this is the valuing moment for Marx.

2.6 FETISHISM OF COMMODITIES

'Fetish is the display of unusual devotion toward a material thing or object in the belief that it has extraordinary powers' (Morrison 1995: 72). As already discussed commodities only have use values created by useful labour and not a single atom of substance is found in a commodity which is valuable. In capitalist societies it is believed that commodities are valuable in themselves and they also possess extraordinary powers. (e.g., the use of branded items of consumption by certain sections of society in liberalized World is due to the belief that the branded items possess extraordinary powers that are not possessed by non-branded items which may be of good quality).

Marx critiqued the political economists as Ricardo and Smith who held that commodities were bearers of value. Also the political economists did not investigate how commodities possessed exchange value in a system of social

relations in a capitalist society. Marx held that commodities are seen to possess extraordinary powers as they enter into a system of exchange relations and a market develops in a capitalist society. Commodities possess extraordinary powers in relation to exchange value and not use value. This is because as bearers of use value commodities satisfy just human needs and are products of useful human labour. This occurs when social relations develop in a capitalist society that individuals believe that value is a part of commodity and the commodity manifests extraordinary powers. In order to explain fetishism of commodities in capitalist societies Marx developed an analogy to tribal societies where individuals believe that certain objects have magical powers. Marx held that there is no magical power inherent in any object. The belief of an object possessing extraordinary powers is due to the individual's relation to the object which is part of a social framework. In capitalism the belief that objects have extraordinary powers is known as 'commodity fetishism.'

Check Your Progress 1

Fill in the blanks with appropriate words:

- 1) A commodity is produced in capitalist society when not only use value but is produced.
- 2) Exchange value is refers to the ability of definite quantitative proportion of a commodity to be represented in the value of a of another commodity.
- 3) Abstract labour is measured in duration of
- 4)labour creates simple use values.

2.7 CIRCULATION OF COMMODITIES

In capitalism commodities enter into a system of exchange. In earlier forms of production as feudalism production is primarily for use and is regarded as social production. Social relations are between individuals. In the stage of, commodity fetishism, it appears that relations are between things and not individuals. In capitalism, relations take the form of exchange. All the activities of buying, selling, producing and consuming are for private gain. Social relations are dominated by exchange and individuals confront each other as buyer, seller, producer and consumer of commodities (Morrison 1995: 75). Individuals are engaged in a system of exchange relations as possessors of commodities circulated in the market. Things are seen as more valuable. Commodities appear to have human like qualities, a fetish form and enter into social relations with one another. The relations between individuals become material relations as individuals are mere possessors of commodities. Commodities, on the other hand, enter into exchange relations and are the determinants of value. As mere possessors of commodities, the human form of individuals in production is obscured.

2.8 THEORY OF SURPLUS VALUE

For all commodities and also for the labour of the worker there is a market in capitalist societies. The capitalist pays a price or wage to the worker in exchange for the services of the worker. The capacity of the worker to do work is referred to as labour power which is bought by the capitalist for a price. Labour power is different from labour which refers to the physical act of labour. The capitalist buys the labour power and pays the worker in the form of wages. The wages are for the maintenance of the workers and for a new generation of workers to be raised who will be valuable to the capitalist (Hughes, Sharrock, and Martin 2003: 64). The exchange value of labour is the price or wage paid by the capitalist to the worker. The use value of labour refers to the capacity of the worker to add value to the things being worked upon. The labour of the worker turns the raw materials in the production process into commodities of utility. Marx holds that the capacity of labour to add value to the commodity that is the 'use value' of labour is greater than the 'exchange value' of labour that is the price or wages paid by the capitalist to the worker. This difference in value represents the surplus value which is appropriated by the capitalist and is a source of profit for the capitalist. It is to be made clear that 'surplus value' is not profit as goods produced must be sold in the market which entails a cost of distribution. It is the capitalist who becomes the owner of the product of labour and appropriates profit as the cost of production and distribution is discounted. Marx holds that the relationship between the capitalist and the worker is inherently exploitative and the worker is dehumanised.

Check Your Progress 2

- 1) Describe the consequences of exchange of commodities in capitalist societies?

.....

- 2) Explain the phrase 'fetishism of commodities' in capitalist societies.

.....

2.9 LET US SUM UP

In this unit we discussed about the concept of commodity in capitalist society. We understood that in contrast to feudal society where production is for use, in capitalist society production is for exchange of commodities in the market. Therefore, the two factors of commodities in capitalist society are use value and exchange value. When we speak of use value of commodities we take into account the qualitative distinction between commodities. The exchange value, on

the other hand, abstracts and generalizes from use value and takes the quantitative distinction between commodities into consideration. Fetishism of commodities implies that commodities possess extraordinary powers in capitalist society which entails that relation between individuals are seen as more material in terms of buyers, sellers, consumers and producers in the market and it appears that social relations are between things and not individuals.

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2.11 SPECIMEN ANSWERS TO CHECK YOUR PROGRESS

Check Your Progress 1

- 1) social use value
- 2) quantitative proportion
- 3) labour time
- 4) useful labour

Check Your Progress 2

- 1) The development of capitalism and exchange of commodities have certain consequences. Firstly the qualitative distinction between use values of commodities recedes to the background while determining exchange. In exchange the emphasis is on a quantitative expression of something that common in all commodities. There is an abstraction from use of commodities. This common expression is the duration of time expended on a commodity or labour time. Secondly the qualitative distinction between different kinds of labour is not considered e.g., the distinction between tailoring and weaving. Thirdly the exchange of commodities brings about changes in social relations in capitalist society where individuals' status in society depends upon their ability to appropriate private products and enter the market.
- 2) The phrase 'fetishism of commodities' refers to the beliefs of individuals that certain commodities have extraordinary powers or human like properties in capitalist societies. Similarly, in tribal societies certain objects are believed to possess magical powers. Marx holds that objects do not

Karl Marx

possess powers but beliefs of individual's make them think that objects possess powers. This occurs when social relations develop in a capitalist society and individuals believe that value is a part of commodity and the commodity manifests extraordinary powers. A fetish can be a branded watch as it is seen as extraordinary and as having an ability to create a certain expression in society.



UNIT 3 SOCIAL FORMATION AND CAPITALIST MODE OF PRODUCTION*

Social Formation and
Capitalist Mode of
Production

Structure

3.0 Objectives

3.1 Introduction

3.2 Production

3.3 Forces of Production

3.4 Relations of Production

3.5 Modes of Production

3.6 Four Modes of Production

3.6.1 Asiatic Mode of production

3.6.2 Ancient Mode of Production

3.6.3 Feudal Mode of Production

3.6.4 Capitalist Mode of Production

3.7 Let Us Sum Up

3.8 References

3.9 Answer to Check Your Progress

3.0 OBJECTIVES

After going through this Unit you should be able to

- explain each of the three concepts: forces of production, relations of production and modes of production;
 - distinguish the above concepts from one another; and
 - locate these concepts in the overall Marxian view of society.
-

3.1 INTRODUCTION

In this Unit, we focus on three major concepts with which Marx constructed the theory of historical materialism. The core concepts and related concepts which this Unit attempts to explain are more or less like tools with which Marx explained the notion of change in capitalist society in particular and that of society in general. Using these concepts, Marx developed a theory aimed at understanding contemporary He also formulated a programme of action to change society. In order to expose you to the Marxian concepts in a

* Adopted from IGNOU Course Material: Units 7 and 9 of *Sociological Thought* (ESO 13) with modifications by Nita Mathur

systematic manner, this unit is broadly divided into four sections in the following order:

First, section 3.2 provides a general understanding of the concept of production.

Secondly, you learn in section 3.3 about the concept of **forces of production**. This section attempts to provide the meaning and significance of the concept.

Thirdly, you will learn in section 3.4 about the concept of **relations of production**. The explanation emphasises the fact that these are social relations and must not be confused with the material and technical aspects of production.

Fourthly, you will learn in section 3.5 about the concept of **modes of production**. In the last section that is section 3.6 we will discuss the four modes of production.

3.2 THE CLASS STRUCTURE

People need food, clothing, shelter and other necessities of life in order to survive. They cannot get all these things ready-made from nature. To survive, they produce material goods from objects found in nature. Material production has always been and still is the basis of human existence.

For Karl Marx, the history of human societies is the story of how people relate to one another in their efforts to make a living. He said, “The first historical act is...the production of material life itself. And indeed this is a historical act, a fundamental condition of all history” (see Bottomore 1964: 60). According to Marx, economic production or production of material life is the starting point from which society as an inter-related whole is structured. He speaks of a reciprocity between economic factors and other aspects of historical development of mankind. The factor of economic production is all the same a key concept in explaining the changes that occur in society. He considers that forces of production along with relations of production form the basis of economic and social history of every society. In his *Introduction to the Grundrisse* (1857-58), Marx says that although the three processes of production, distribution and consumption are not one and the same, they represent a totality. It is so because after completion, each of the three processes creates the other process. In this way, one mediates the other. For example, production, once complete, becomes an object of consumption. Similarly, distribution and production are closely related processes. In this way, these economic categories carry definite relations between them. For Marx, a certain type of production creates a certain type of distribution, exchange and consumption. On the basis of all these economic categories are formed certain types of relations of production. Marx argues that production itself is based on other economic categories and clear-cut relation between

production and other economic processes. What is evident is that material production is basic to human societies.

For Marx, production is both a general and a historical category. In *Capital* (1861-1879) Marx has made use of the term 'production' as a general category to highlight the specific forms of production in capitalist societies. On the other hand, speaking about production with definite social and historical characteristics, Marx discusses the concept of mode of production. About this you will read in the last section of this unit.

Here, we need to remember that the role of production in human history became a guiding thread in Marx's writings. Let us follow this thread in order to understand his thought. We begin with a consideration of forces of production.

3.3 FORCES OF PRODUCTION

The forces of production express the degree to which human beings control nature. The more advanced the productive forces are, greater is their control over the nature and vice versa. You can say the forces of production are the ways in which material goods are produced. They include the technological know-how, the types of equipment in use and goods being produced for example, tools, machinery, labour and the levels of technology are all considered to be the forces of production.

The forces of production, according to Marx, include means of production and labour power (see Box 3.1). The development of machinery, changes in the labour process, the opening up of new sources of energy and the education of the **workers** are included in the forces of production. In this sense science and the related skills can be seen as part of the productive forces. Some Marxists have even included geographical or ecological space as a productive force.

Involuntary changes in technology, demography, ecology in 'material life' affect the mode of production itself and perceptibly alter the balance of productive relations. But involuntary changes do not spontaneously restructure or reorganise a mode of production. Any restructuring of relations of power, forms of domination and of social organisation has been mostly the outcome of struggles. The condition and character of the struggle are determined by changes in material life.

In every social order there is a continuous change in the material forces of production. Sometimes, as in tribal societies, this change is produced by some natural and ecological phenomena, such as the drying up of rivers, deforestation in or exhaustion of the soil etc. Usually, however, this change is produced by a development in the instruments of production. Human beings have always attempted to better their lives and overcome scarcity. The development of forces of production reflects the constant struggle of human beings to master nature through their labour.

The development of the forces of production is primary because it results from a factor, which is, in a sense, exogenous. The motive force lies outside the forces and relations of production and acts first upon the former. The motive force is the rational and ever-present impulse of human beings to try to better their situation and overcome scarcity by developing the productive forces. Human beings are, above all, like animals producing society by acting upon nature through their labour.

Productive forces transform nature into use values and exchange values. The productive forces compel the creation and destruction of successive systems of production relations between human beings.

Productive forces have an intrinsic tendency to develop, as human beings' knowledge and mastery over nature increase. As these forces develop, successive social relations of production develop and consequently give way. At a particular point of development the productive forces and the production relations enter into conflict: the latter being unstable to contain the former. Society then enters a period of revolution. People become conscious of this by recognising the existence of class struggle, between those whose activity fits them for the new economic structure, and those who are guardians of the old.

Box 3.1 Labour Power

According to Marx, labour power is the capacity to do such useful work which increases the value of products. Workers sell their labour power i.e. their capacity to do work which adds value to commodities. They sell their labour power to capitalists for a wage paid in cash.

We should distinguish labour power from labour. Labour is the actual exercise of one's power to add value to commodities. The category of labour power is used by Marx to explain the source of surplus value. Let us say that the capitalists invest money to buy goods and later sell them for more money than they invested. This is possible only if some value is added to those goods. Labour power, according to Marx, is precisely that capacity which adds value to a commodity. In buying and using labour power the capitalist is able to extract labour and labour is the source of value. The source of surplus value in capitalist system of production is located in the process whereby the value paid by capitalists for labour power is smaller than the value which labour power adds to a commodity.

Different socio-economic organisations of production, which have characterised human history, arise or fall as they enable or impede the expansion of society's productive capacity. The growth of the productive forces thus explains the general course of human history. The productive forces, however, include, as we have already noted, not just the means of production (tools, machines, factories and so on), but labour power, the skills, knowledge, experience, and other human faculties used in work. The

productive forces represent the powers society has at its command in material production.

Check Your Progress 1

1) Which of the following cannot be conducted as a force of production?

- a) Tractor
- b) Labour Power
- c) Steam engine
- d) Windmill
- e) Computer
- f) Missile

2) Tick mark the correct statement.

With the increase of productive forces,

- a) our mastery over nature increases.
- b) we become enslaved to nature.
- c) we become more conscious of nature.
- d) we turn into a guardian of nature.

3) Tick mark the correct statement.

Material forces of production are

- a) more or less stagnant.
- b) continuously expanding.
- c) moving towards scarcity.
- d) potentially destructive.

3.4 RELATIONS OF PRODUCTION

The forces of production are not the only factors in material production. People are able to produce jointly by organising in a society. In this sense, labour is and always has been social in character. According to Marx, in order to produce, people enter into definite relations with one another. Only within these social relations does production take place. You can easily say that the relations of production are the social relations found among the people involved in the process of production. These social relations are determined by the level and character of the development of productive forces.

‘Forces’ and ‘relations’ of production are strongly interrelated. The development of one leads to a growing incompatibility or contradiction with the other. In fact, the contradictions between the two aspects of production ‘act as the motor of history’ (Bottomore 1983: 178). The chain of causation in historical development runs like this. The forces of production determine

the superstructure. There is, however, quite a good deal of controversy regarding the primacy of the forces of production over the relations of production. As we said earlier we shall not go into the detail of these interpretations of Marxism. In Marx's own writings, you may like to remember, there is ambiguity on this matter. In places, he gives primacy to the relations of production while in other places he describes forces of production as the prime mover of social change.

The relations of production, which are said to correspond to society's productive level, link the productive forces and human beings in the process of production. These relations are of two broad types. The first refers to those technical relations that are necessary for the actual production process of products. The second refers to the relations of economic control, which are legally manifested as property ownership. They govern access to the forces of production and products.

Relations of production are the social relations of production. As such they include both the relations between the direct producers or workers and their employers or those who control their labour, and the relations between the direct producers themselves.

Relation of production is not merely the ownership of means of production. The employer's relation to the worker is one of domination and the worker's relation with co-workers is one of cooperation. The relations of production are relations between people and people whereas means of production are relations between people and things. The relations of production can influence the momentum and direction of the development of the productive forces.

Relations of production are reflection in the economic ownership of productive forces. For example, under capitalism the most fundamental of these relations is the **bourgeoisie's** ownership of means of production while the proletariat owns only its labour power.

The relationships of production can also dominate and generate changes in the forces. For example capitalist relations of production often do revolutionize the instruments of production and the labour process.

Activity 1

Describe briefly in about 250 words the process of industrialisation in India in terms of forces and relations of production. Discuss this topic with your Academic Counsellor and fellow students at your study centre before completing this activity.

At a certain stage of their development, the material productive forces of society come into conflict with the existing relations of production. The contradiction between forces and relations of production accounts for history existing as a succession of modes of production. The contradiction leads to

the necessary decline of one mode and its replacement by another. Forces and relations of production, in any mode of production underline not just the economic progress, but a movement of the whole of society from one stage to another. Let us in the next section discuss Marx's concept of mode of production.

Check Your Progress 2

1) Tick the correct answer

Relations of production primarily consist of

- a) individual motives for acquisition in society.
- b) asymmetrical exchange of goods in the market.
- c) ideal material needs of humans in history.
- d) differential requirements of classes in society.
- e) social relationship arising out of the production process.

2) Tick the correct answer.

Relations of production constitute relationships between

- a) things and things.
- b) people and things.
- c) people and people.
- d) none of these.

3) Which of the following statements is correct?

- a) Relations of production is not merely the ownership of means of production.
- b) Relation of production is not a human relationship at all.
- c) Relation of production is not a cooperative relationship between individuals.
- d) Relation of production is essentially an exploitative relationship between producers.

4) Which of the following statement is correct?

- a) Relationship of production can also dominate and generate changes in the forces of production.
- b) Relationship of production have essentially no relationship to forces of production.
- c) Relationships of production can be at conflict with forces of production.
- d) Relationship of production can generate changes in forces of production.

3.5 MODES OF PRODUCTION

In Marx's writing, stages of social history are differentiated not by what human beings produce but by how, or by what means, they produce the material goods for subsistence. In this way, we can say that historical periods are founded and differentiated on the basis of the modes of material production. In other words, at the basis of history are successive modes of material production. You can also say that the forces and relations of production are two aspects of mode of production. The productive forces of society reflect the degree to which human beings control nature. The more advanced the productive forces, the greater is their control over nature. In order to produce, people enter into definite relations with one another. This is the relations of production aspect of how material goods are produced. Production takes place within these social relations. You can say that any historical mode of production is an integral unity between the forces of production and the relations of production. You can also say that the forces of production shape the relations of production and the two together define the mode of production. That is the general economic frame or particular manner in which people produce and distribute the means to sustain life. In this sense, the successive modes of production are the basic element of a systematic description of history.

Keeping aside the debate among the Marxist scholars concerning the definition of 'mode of production', we can say that crucial element in defining mode of production is 'the way in which the surplus is produced and its use controlled' (Bottomore 1983: 337). Surplus means the amount that remains when use or need is satisfied. According to Marx, under capitalist mode of production, the surplus takes the form of profit. Surplus is produced by exploiting the working class and is sold for more than the wages given to the workers. Because production of surplus enables societies to grow and change, this factor is taken to be most important in defining mode of production.

Each mode of production has its specific relations of production. These are not developed by chance or by accident. They are deliberately ordered because they help the property owning class extract the surplus from the working people. Take an example. The relations of production under feudalism, in which the serf is dominated in all respects by the feudal lord, are necessary to enable the feudal lord to appropriate the surplus from the serf. If such a relationship is continued under capitalism it will fail. Therefore a new set of production relations develops under capitalism that enables the capitalist appropriate surplus value from the workers.

It should also be noted that neither the forces of production nor the relations of production are fixed and static. Even within a given mode of production the forces of production may change. In any society, we may find that over the years greater production follows improvements in technology. The capitalist

nations are very different from what they were two to three hundred years ago, when capitalism was born. This change in the productive forces has resulted in changes in the relations of production. The workers in the twenty first century may not be as exploited as the factory workers in the nineteenth century. Marxists would, however, argue that exploitation still remains, because the modern workers, with modern technology, produce more surplus value than their predecessors, and they do not proportionately earn that much more.

Check Your Progress 3

- 1) Tick mark the correct answer.

According to Marx, mode of production is

- a) an empirical concept
 - b) a psychological phenomenon.
 - c) a biological fact
 - d) economic variable
 - e) an abstract construct
- 2) Which of the following statements is correct about the nature of humans? It is
- a) not immutable but historical
 - b) a manifestation of ecological factors
 - c) determined by psychological traits
 - d) an indeterminate unconscious state of mind
- 3) Which of the following can be appropriately called a mode of production?
- a) Pastoral
 - b) Agricultural
 - c) Feudal
 - d) Tribal
 - e) National

3.6 FOUR MODES OF PRODUCTION

More than one mode of production may exist within any particular society at a given point in time. But in all forms of society there is one determinate kind of production which assigns rank and influence to all the others. Here we shall discuss each of the four modes of production, identified by Marx during his studies of human societies.

3.6.1 Asiatic Mode of Production

The concept of **Asiatic mode of production** refers to a specific original mode of production. This is distinct from the ancient slave mode of production or

the feudal mode of production.

The Asiatic mode of production is characteristic of primitive communities in which ownership of land is communal. These communities are still partly organised on the basis of kinship relations. State power, which expresses the real of imaginary unity of these communities, controls the use of essential economic resources, and directly appropriates part of the labour and production of the community.

This mode of production constitutes one of the possible forms of transition from classless to class societies; it is also perhaps the most ancient form of this transition. It contains the contradiction of this transition, i.e. the combination of communal relations of production with emerging forms of the exploiting classes and of the State.

Marx did not leave behind any systematic presentation of the history of India. He set down his observations on certain current Indian questions which attracted public attention, or drew materials from India's past and present conditions to illustrate parts of his more general arguments. The concept of Asiatic mode of production is therefore inadequate for an understanding of Indian history and society.

Box 3.2 Marx and Indian Society

Marx made no full-scale study of Indian society. The ideology of Hinduism was to him an ideology of an outdated social milieu. He was most skeptical of a Hindu golden age of the bygone era. British rule in India was seen by Marx as a graft on to Asiatic despotism.

3.6.2 Ancient Mode of Production

Ancient Mode of Production refers to the forms which precede capitalist production. In some of these terms slavery is seen as the foundation of the productive system. The relation of **masters** to **slaves** is considered as the very essence of slavery. In this system of production the master has the right of ownership over the slave and appropriates the products of the slave's labour. The slave is not allowed to reproduce. If we restrict ourselves to agricultural slavery (see box 3.3), exploitation operates according to the following modalities: the slaves work the master's land and receive their subsistence in return. The master's profit is constituted by the difference between what the slaves produce and what they consume. But what is usually forgotten is that beyond this, the slaves are deprived of their own means of reproduction. The reproduction of slavery depends on the capacity of the society to acquire new slaves, that is, on an apparatus which is not directly linked to the capacities of demographic reproduction of the enslaving population. The rate of accumulation depends on the number of slaves acquired, and not directly on their productivity.

Slaves are different from the other members of the community in that they are rightfully deprived of offspring. Their status as 'foreigners' is permanent. A profit is made out of the 'foreigner'.

Hence, if one wants the system to have a certain continuity and to become organic, then one must not allow the slave to have dependents. In each generation one must provide the means of introducing foreigners as replacements for worn-out slaves. We find an intimate and necessary liaison between these two levels of exploitation: a relation through pilfering between one population and another, and a relation of exploitation between the class of slaves and the class of masters.

In slavery, the growth of the labour force is independent of effective demographic forces. It rests not on the demographic growth which is due to natural increase, but on the means devoted to the capture (as in war) of foreign individuals. The possibility of accumulation comes about through the multiplication of slaves independently of growth in the productivity of labour.

Box 3.3 Agricultural Slavery

Slavery mode of production, which Marx referred to, was found in Italy during formation of the Roman empire. Around 200 AD this empire included western Asia, the whole of northern Africa from Egypt to Morocco and most of Europe, including Britain. It had a territory of about one million seventy five thousand square miles and a population of about sixty million. Such a large empire was obviously a mixture of heterogeneous societies with various modes to production. Only in Roman Italy slavery on the land (agricultural slavery) assumed an importance beyond anything experienced before. Also, in some of the city-states. Such as Athens, slavery was a dominant mode production. The ruling classes in these regimes acquired their wealth from slave labour. In the western half of the Roman empire the production transformed from ancient to feudal mode.

This mode of exploitation permits a demographic manipulation of society. It permits the modification of the birth rate, the manipulation of the 'age' at birth, and the manipulation of the duration of life, especially active life.

The test of the dominance of slave mode of production lies not in the numbers of the slaves but in their location, that is, in the extent to which the elite depend on them for their wealth.

3.6.3 Feudal Mode of Production

Marx and Engels were primarily interested in the definition of the capitalist mode of production. Their writing about feudalism tended to mirror that interest, as well as focusing on the transition between the feudal and the capitalist modes of production. They were concerned with the 'existence form' of labour and the manner in which the products of labour were

appropriated by ruling classes. Just as capitalists exploited the workers or the 'proletariat', so did the feudal **lords** exploit their tenants or '**serfs**'. Capitalists grabbed surplus value and feudal lords appropriated land rent from their serfs.

Serfs, being legally unfree, were deprived of property rights, though they could use the lord's property. They were obliged to surrender their labour, or the product of their labour, over and above what was needed for family subsistence and the simple reproduction of the peasant household economy. Serfs or the producers were forced to fulfil the economic demands of an overlord. These demands could be in the form of services to be performed. These could also be in the form of dues to be paid in money or kind. The dues or taxes were levied on the family holdings of the peasants. Thus feudal rent whether in the form of services or taxes was an important component of the feudal mode of production. The feudal lord was able to force serfs on the basis of military strength. This power was also backed by the force of law. In this mode of production, serfdom implied a direct relation between rulers and servants. In feudal serfdom, the instruments of production were simple and inexpensive.

Feudal society was seen by Marx and Engels as intermediate, i.e., between the slave society of the ancient world and capitalists and proletarians in the modern era.

The evolution of the feudal system brought about the development of exchange of agricultural and manufactured products in regional markets. Special needs of the ruling class and high ranking Church officials gave an impetus to the growth of commodity production, including consumption goods such as silks, spices, fruits and wines. Around this activity developed international trade routes and mercantile centres. It laid the foundation for capitalist relations of production, which were to become the main contradiction of the system and cause its downfall. In the course of this transformation, many peasants were expropriated from their lands and forced to become wage-labourers.

Activity 2

Do you think that agrarian society in any part of India was ever dominated by feudal lords? If yes, describe in two pages how during this period peasants were deprived of property rights though they had rights of use. Were the peasants expected to give their labour or product of their labour to feudal lords? Write your answers to these questions on a sheet of paper and compare them with those of other students at your Study Centre.

3.6.4 Capitalist Mode of Production

Capitalism refers to a mode of production in which capital is the dominant means of production. Capital can be in various forms. It can take the form of

money or credit for the purchase of labour power and materials of production. It can be money or credit for buying physical machinery. In **capitalist mode of production**, the private ownership of capital in its various forms is in the hands of a class of capitalists. The ownership by capitalists is to the exclusion of the mass of the population. You can take this to be a central feature of capitalism as a mode of production.

As a mode of production, capitalism has the following characteristics (see Bottomore 1983: 64).

- Goods are produced for sale rather than own use.
- The capacity to do useful work or labour power is bought and sold in a market. For a period of time (time rate) or for a specified task (piece rate) labour power is exchanged for money wages. In ancient mode of production labourers were obliged or forced to surrender their labour. Contrarily, in capitalist mode of production labourers enter into a contract with employers.

The use of money as a medium of exchange. This gives an important role to banks and financial intermediaries.

The production process is controlled by the capitalists or their managers. Financial decisions are controlled by the capitalist entrepreneur. Individual capitalists compete for control over the labour and finance. As a mode of production, capitalism first emerged in Europe. The industrial revolution starting in England and spreading across different countries saw a rapid growth of technology and corresponding rise of capitalist economies. Marx viewed capitalism as a historical phase, to be eventually replaced by socialism.

Box 3.4 Capitalist Society

Based on private capitalist ownership the capitalist relations of production facilitated tremendous growth of the productive forces. With this growth of productive forces, capitalist relations of production ceased to correspond to forces of production in feudal system. The most significant contradiction of the capitalist mode of production is the contradiction between the social character of production and the private capitalist form of appropriation. Production in capitalist society bears a strikingly pronounced social character. Many millions of workers are concentrated at large plants and take part in social production, while the fruits of their labour are appropriated by a small group of owners of the means of production. This is the basic economic contradiction of capitalism. This contradiction or conflict of opposites gives rise to economic crisis and unemployment, causes fierce class battles between the bourgeoisie (the capitalists) and the proletariat (the working class), in other words, quantitative changes. The working class would help bring about a socialist revolution. This revolution would, according to Marx abolish the capitalist production relations and usher in the new qualitative change i.e. the

communist socio-economic formation.

The new communist socio-economic formation, as we have seen earlier, passes in its development through two phases, socialism and communism. Socialism does away with private ownership of the means of production. It establishes public ownership of means of production. In such a society the proletariat will jointly own means of production and distribute the produce according to the needs of people. This is the stage of dictatorship of proletariat, which will later on also; do away with the state apparatus leading to a stateless society. This stage of the stateless society will be possible in communism, where the dialectic finally unfolds itself, ushering in a social system which would be free of any contradictions within classes. According to the laws of dialectics contradictions will remain as this is the basis of development. Under communism there will be contradiction between Human Being and Nature, as in Primitive-Communism. The basic difference now is that the level of technology will be higher and Nature will be exploited more efficiently. Thus we see how the three laws of dialectics operate in Marx's interpretation of the history of society (Unit 9, ESO 13).

Check Your Progress 4

- 1) Tick mark the correct answer.

In which mode of production is there communal ownership of land?

- a) Asiatic
- b) Ancient
- c) Feudal
- d) Capitalist

- 2) Tick mark the correct answer.

In which mode of production are the producers considered private property?

- a) Asiatic
- b) ancient
- c) feudal
- d) capitalist

- 3) Tick mark the correct answer.

Under which mode of production is labour power bought and sold?

- a) Asiatic
- b) ancient
- c) feudal
- d) capitalist

4) Tick mark the correct answer.

In feudal mode of production surplus is expropriated through

- a) Profit
- b) rent
- c) speculation
- d) surplus value
- e) trade

3.7 LET US SUM UP

The concepts of forces, relations and mode of production are central to Marxist social theory. The mode of production, which for Marx is the main determinant of social phenomena, is made up of the forces of production and relations of production.

The forces of production refer to both the material worked on and the tools and techniques employed in production of economic goods. The relationships of production refer to the social relations arising in the process of production, especially between the owners and non-owners of the means of production. Relations of production include the control and the capacity to possess the products.

Thus in capitalist societies, for example, the relations of production are those relations that obtain between capitalist and worker such that the former (relations of production) both controls the means of production and can dispose of the goods and services that are produced by the worker.

The forces and relations of production are fundamental to the constitution of any society. The different ways in which different societies are organised depend upon the relationship of the forces of production to the relations of production. The concept of the social relationships of production does not so much refer to the relationship between individuals as between social classes. Because the relationships of production are essentially antagonistic (for example, the capitalist appropriates the product of labour of the worker), so are the relations between the classes.

A mode of production is the relationship between the relations of production and the forces of production. Modes of production can be distinguished from one another by the different relationships between the forces and relations of production. For example, in the feudal mode of production, the lord does not possess direct control over the peasant's forces of production, tools and land, but does have control over the disposition of the peasant's produce. In the capitalist mode of production, on the other hand, the capitalist controls both the forces of production and the disposition of the product.

Mode of production is an abstract analytical concept. In any particular society at a particular point in time there may exist more than one mode of production.

However, it is possible to identify a dominant or determinant mode of production which gains primacy over all the other production systems. Particularly during the period of social revolution more than one mode of production co-exist in the same society. However, Marx has left behind the theoretical conceptualisations relating to four modes of production; Asiatic, ancient, feudal and capitalist. This last mode of production was his major theoretical concern.

3.8 REFERENCES

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3.9 SPECIMEN ANSWERS TO CHECK YOUR PROGRESS

Check Your Progress 1

- 1) (f)
- 2) (a)
- 3) (b)

Check Your Progress 2

- 1) (e)
- 2) (c)
- 3) (a)
- 4) (b)

Check Your Progress 3

- 1) (e)
- 2) (a)
- 3) (c)

Check Your Progress 4

- 1) (a)
- 2) (b)
- 3) (d)
- 4) (b)

UNIT 4 CLASS AND CLASS STRUGGLE*

Structure

4.0 Objectives

4.1 Introduction

4.2 The Class Structure

4.2.1 Criteria for Determination of Class

4.2.2 Classification of Societies in History and Emergence of Classes

4.2.3 Intensification of Class Conflict under Capitalism

4.3 Class Struggle and Revolution

4.4 Marx's Concept of Alienation

4.5 Let Us Sum Up

4.6 References

4.7 Answers to Check Your Progress

4.0 OBJECTIVES

After reading this unit, you should be able to:

- define the concept of class;
- describe the various criteria for class formation;
- identify the various stages involved in the history of society that change due to class conflict or change in mode of production;
- discuss what is social revolution and how it will be reached; and
- explain Marx's concept of alienation.

4.1 INTRODUCTION

This Unit will explain the key notion of class as used by Karl Marx. We will discuss about the various criteria that are basic for calling any collectivity a class. Also we shall discuss how and why classes come into conflict with each other. We will seek to understand the impact of these class conflicts on the history of development of society. Finally, the present unit will give you a brief overview of history including the future of human society on the basis of Marxian framework. The Unit discusses the class structure, including the classification of societies in history and class struggle. We go on to elaborate the intensification of class conflict under capitalism, discuss class struggle and revolution and explain Marx's concept of alienation.

* Adopted from IGNOU Course Material: Unit 8 of Sociological thought (ESO 13) with modifications by Nita Mathur

4.2 THE CLASS STRUCTURE

The word 'class' originated from the Latin term 'classis' which refers to a group called to arms, a division of the people. In the rule of legendary Roman king, Servius Tullius (678-534 B.C.), the Roman society was divided into five classes or orders according to their wealth. Subsequently, the word 'class' was applied to large groups of people into which human society came to be divided.

Marx recognised class as a unique feature of capitalist societies. This is one reason why he did not analyse the class structure and class relations in other forms of society.

Marx's sociology is, in fact, sociology of the class struggle. This means one has to understand the Marxian concept of class in order to appreciate Marxian philosophy and thought. Marx has used the term social class throughout his works but explained it only in a fragmented form. The most clear passages on the concept of class structure can be found in the third volume of his famous work, *Capital* (1894). Under the title of 'Social Classes' Marx distinguished three classes, related to the three sources of income: (a) owners of simple labour power or labourers whose main source of income is labour; (b) owners of capital or capitalists whose main source of income is profit or surplus value; and (c) landowners whose main source of income is ground rent. In this way the class structure of modern capitalist society is composed of three major classes viz., salaried labourers or workers, capitalists and landowners.

At a broader level, society could be divided into two major classes i.e. the 'haves' (owners of land and / or capital) often called as bourgeoisie and the 'have-nots' (those who own nothing but their own labour power), often called as proletariats. Marx has tried to even give a concrete definition of social class. According to him 'a social class occupies a fixed place in the process of production'.

Activity 1

Can Indian society be divided into classes in Marxian sense of the word 'class'? If yes, describe these classes. If no, give reasons why Indian society cannot be divided into in Marxian sense of the word 'class'.

4.2.1 Criteria for Determination of Class

In order to have a better understanding of the concept of class and class structure, one must be able to respond to the question – "What are the criteria for determination of class"? In other words, which human grouping will be called a class and which grouping would not be considered as class in Marxian terms. For this exercise, one could say that a social class has two major criteria: (i) objective criteria (ii) subjective criteria.

- i) **Objective Criteria:** People sharing the same relationship to the means of production comprise a class. Let us understand it through an example – all labourers have a similar relationship with the landowners. On the other hand all the landowners, as a class, have a

similar relationship with the land and labourers. In this way, labourers on one hand and landowners on the other hand could be seen as classes. However, for Marx, this relationship alone is not sufficient to determine the class. According to him it is not sufficient for class to be ‘class in itself’ but it should also be class for itself. What does this mean? By ‘class in itself’ he means the objective criteria of any social class. Obviously, Marx is not simply satisfied with objective criteria above. Hence he equally emphasises upon the other major criteria i.e., “Class for itself” or the subjective criteria.

- ii) Subjective Criteria:** Any collectivity or human grouping with a similar relationship would make a category, not a class, if subjective criteria are not included. The members of any one class not only have similar consciousness but they also share a similar consciousness of the fact that they belong to the same class. This similar consciousness of a class serves as the basis for uniting its members for organising social action. Here this similar class consciousness towards acting together for their common interests is what Marx calls – “Class for itself”.

In this way, these two criteria together determine a class and class structure in any given society.

Check Your Progress 1

- 1) Define social class.

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- 2) Name two criteria for determining class.

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4.2.2 Classification of Societies in History and Emergence of Classes

Marx differentiated stages of human history on the basis of their economic regimes or modes of production. He distinguished four major modes of production which he called the Asiatic, the ancient, the feudal and the bourgeois or capitalist. He predicted that all social development will culminate into a stage

called communism. Let us simplify this classification of societies or various stages of human history into (i) primitive-communal, (ii) slave-owning, (iii) feudal, (iv) capitalist, and (v) communist stages. In this sub-section we will discuss the first three stages.

i) The Primitive-communal System

The primitive-communal system was the first and the lowest form of organisation of people and it existed for thousands of years. Men and women started using primitive tools like sticks and stones for hunting and food-gathering. Gradually they improved these tools, and learned to make fire, cultivation and animal husbandry. In this system of very low level of forces of production, the relations of production were based on common ownership of the means of production. Therefore, these relations were based on mutual assistance and cooperation. These relations were conditioned by the fact that people with their primitive implements could only withstand the mighty forces of nature together, collectively.

In such a situation, exploitation of humans by humans did not exist because of two reasons. Firstly, the tools used (namely, means of production) were so simple that they could be reproduced by anyone. These were implements like spear, stick, bow and arrow etc. Hence no person or group of people had the monopoly of ownership over the tools. Secondly, production was at a low-scale. The people existed more or less on a subsistence level. Their production was just sufficient to meet the needs of the people provided everybody worked. Therefore, it was a situation of no master and no servant. All were equal.

Gradually with time, people started perfecting their tools, their craft of producing and surplus production started taking place. This led to private property and primitive equality gave way to social inequality. Thus the first antagonistic classes, slaves and slave owners, appeared.

This is how the development of the forces of production led to the replacement of primitive communal system by slavery.

ii) The Slave-owning Society

In the slave-owning society, primitive tools were perfected and bronze and iron tools replaced the stone and wooden implements. Large-scale agriculture, live stock raising, mining and handicrafts developed. The development of this type of forces of production also changed the relations of production. These relations were based on the slave owner's absolute ownership of both the means of production and the slave and everything they produced. The owner left the slaves only with the bare minimum necessities to keep them from dying of starvation. In this system, the history of exploitation of humans by humans and the history of class struggle began. The development of productive forces went on and slavery became an impediment to the expansion of social production. Production demanded the constant improvement of implements, higher labour productivity, but the slaves had no interest in this as it would not improve their position. With

the passage of time the class conflict between the classes of slave- owners and the slaves became acute and it was manifested in slave revolts. These revolts, together with the raids from neighboring tribes, undermined the foundations of slavery leading to a new stage i.e. feudal system (See Box 4.1).

Box 4.1 Feudal System

The term feudalism is derived from the institution of 'fief', which was a piece of landed property. During the medieval period of European history, this form of property was given to a vassal by a lord in return for military service. In this sense feudalism was a relationship between a vassal and his Lord. This relationship was expressed in terms of property holding through the fief. The relationship was exercised through jurisdiction. Lords held courts for their vassals, settled disputes and punished breaches of law and custom. The court was also an administrative body which levied taxes and raised military forces. Landowners maintained control over the peasantry. By the twelfth century, landowners' control over tenants and others had increased to a very great extent.

iii) The Feudal Society

The progressive development of the productive forces continued under feudalism. People started using inanimate sources of energy, viz., water and wind, besides human labour. The crafts advanced further, new implements and machines were invented and old ones were improved. The labour of crafts persons was specialised, raising productivity considerably. The development of forces of production led to emergence of feudal relations of production. These relations were based on the feudal lords' ownership of the serfs or landless peasants. The production relations were relations of domination and subjection, exploitation of the serfs by the feudal lords. Nevertheless, these relations were more progressive than in slavery system, because they made the labourers interested, to some extent, in their labour. The peasants and the artisans could own the implements or small parts of land. These forces of production underwent changes due to new discoveries, increasing demands for consumption caused by population increase and discovery of new markets through colonialism. All this led to the need and growth of mass scale manufacture. This became possible due to advances in technology. This brought the unorganized labourers at one place i.e. the factory.

This sparked off already sharpened class conflict leading to peasant revolution against landowners. The new system of production demanded free labourer whereas the serf was tied to the land, therefore, the new forces of production also changed the relations of production culminating into a change in the mode of production from feudalism to capitalism. In the next sub-section we will talk about class conflict in capitalist societies. So, the next section will cover our discussion of the fourth stage of social development. But before going to it, let us complete Check Your Progress 2.

Check Your Progress 2

1) Give the five stages of society as given by Marx.

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2) Mark True or False against each of the following statements

- a) History of class antagonism begins of slavery systems. True/False
- b) There was no private ownership of property in primitive-communal systems. True/False

4.2.3 Intensification of Class Conflict under Capitalism

Large-scale machine production is the specific feature of the productive forces of capitalism. Huge factories, plants and mines took the place of artisan workshops and manufacturers. Marx and Engels described the capitalist productive forces in the 'Manifesto of the Communist Party'. "Subjection of Nature's forces to man, machinery, application of chemistry to industry and agriculture, steam navigation, railways, electric telegraphs, clearing of whole continents for cultivation, canalisation of rivers, whole populations conjured out of the ground". In a century or two capitalism accomplished much more in developing the productive forces than had been achieved in all the preceding eras of human history.

This vigorous growth of the forces of production was helped by the capitalist relations of production based on private capitalist ownership. Under capitalism, the producers, the proletariat, are legally free, being attached neither to the land nor to any particular factory. They are free in the sense that they can go to work for any capitalist, but they are not free from the bourgeois class as a whole. Possessing no means of production, they are compelled to sell their labour power and thereby come under the yoke of exploitation.

Due to this exploitation the relatively free labourers become conscious of their class interest and organise themselves into a working class movement. This working class movement intensified its struggle against the bourgeois class. It begins with bargaining for better wages and working conditions and culminates into an intensified class conflict, which is aimed at overthrowing the capitalist system. Marx said that the capitalist system symbolises the most acute form of inequality, exploitation and class antagonism. This paves the way for a socialist revolution which would lead to a new stage of society i.e. communism (see Box 4.2).

With the advent of the Third (Communist) International in 1917, the term communism was applied to a form of revolutionary programme for overthrowing capitalism. We can say that the term socialism began to be applied to a more peaceful and constitutional action of long-term changes, while communism referred to a revolutionary action, involving violent forms of changes.

Box 4.2 Communism

The word 'communism' originated in the mid-1830s, when it was used by members of the secret revolutionary parties in Paris. It referred to political movement of the working class in capitalist society. It also referred to the form of society which the working class would create as a result of its struggle. During the later half of the nineteenth century, both terms, socialism and communism, were used interchangeably to describe the working-class movement. Marx and Engels also used these terms in a similar fashion.

Marx discussed communism as a form of society. In the Economic and Philosophical Manuscripts (1844) he wrote that 'Communism is the positive abolition of private property, of human self-alienation, and thus the real appropriation of human nature, through and for man'.

4.3 CLASS STRUGGLE AND REVOLUTION

It is clear that according to Marx the mode of production or economic structure is the base or foundation of society. Any change in this infrastructure will cause fundamental changes in the superstructure and consequently in a society. The changes in the mode of production are essentially changes in the forces of production and relations of production. In primitive communal stage there was no surplus production and hence it had no inequality and exploitation caused by the private ownership of means of production. The means of production were common property of the community. With the development and improvements in the forces of production there was increased productivity. This caused private ownership of means of production and change in the relations of production. This marked the end of primitive-communal system and thus began the long history of inequality, exploitation and class conflict, coinciding with the emergence of slave-owning society.

In the slave-owning society the class conflict between the slave owners and slaves reached a peak causing a change in the mode of production from slavery to feudalistic mode of production. Marx has said that the history of hitherto existing society is a history of class struggle. This means that the entire history of society is studded with different phases and periods of class struggle. This history of class struggle begins in the slave-owning society and continues through feudal society where this class struggle is between classes of the feudal lords and the landless agricultural labourers or serfs. Due to change in mode of production and class struggle a new stage of society i.e., capitalism replaces the age-old feudal system.

In the capitalistic mode of production the class antagonism acquires most acute dimensions. The working class movement begins to concretise and reaches its peak. Through a class conflict between the class of capitalists and the class of industrial labourers, the capitalist system is replaced by socialism. This violent change has been termed as revolution by Marx. We shall deliberate on this concept of revolution in detail in the next section. This marks, according to Marx,

the fifth stage of social development. Before reading about the fifth stage in the next sub-section, please complete Activity 2.

Activity 2

Do you think that Indian history provides us with some examples of class conflict? If yes, elaborate at least one such example. If no, then give reasons for the absence of class conflict in Indian history.

Marx said that the class antagonism and subsequently the class conflict in the capitalist system will usher in socialism in place of capitalism through a revolution. Here the question arises what is the basis of this antagonism? Marx's answer is that the contradiction between the forces and the relations of production is the basis of this antagonism. The bourgeoisie is constantly creating more powerful means of production. But the relations of production that is, apparently, both the relations of ownership and the distribution of income are not transferred at the same rate. The capitalist mode of production is capable to produce in bulk, but despite this mass production and increase in wealth, majority of the population suffers from poverty and misery. On the other hand, there are a few families who have so much wealth that one could not even count or imagine.

These stark and wide disparities create some tiny islands of prosperity in a vast ocean of poverty and misery. The onus of this disparity lies on the unequal, exploitative relations of production which distribute the produce in an unequal manner.

This contradiction, according to Marx, will eventually produce a revolutionary crisis. The proletariat, which constitutes and will increasingly constitute the vast majority of the population, will become a class, that is, a social entity aspiring for the seizure of power and transformation of social relations.

Marx asserted that the progress of society meant the succession of victories of one class over the other. He assigned his life to planning a victory for the proletariat. In a way, he became a commander, engaged in a campaign. With his solitary aim of defeating the enemy, Marx stressed on acquiring the knowledge of the history of society and the laws that regulate its organisation. His monumental work, *Das Kapital* (Capital, 1861-1879), provided an analysis in which Marx was not concerned with arguments for a class-war. He treated the necessity for such arguments as an unnecessary task. He had no love for emotionalism and humanitarianism and appeal to idealism etc. He conceived of the class conflict on every front and proposed the formation of a political party which would eventually gain victory and be the conquering class.

You do not have to imagine that it was Marx who, for the first time ever, advanced the idea of conflict between classes. Saint Simon wrote about human history as the history of struggles between social classes. In the 1790s Babeuf, a French political agitator, spoke of the dictatorship of the proletariat and Weitling and Blanqui (Babeuf's disciple) developed Babeuf's ideas in the nineteenth century. The French State Socialists worked out the future position and

importance of workers in industrial states. In fact in the eighteenth century many thinkers advanced such doctrines. Marx did the admirable task of sifting all this material and constructed a new set of social analysis. His analysis of class struggle was a unique mix of simple basic principles with down-to-earth details.

According to Marx, the bottom rung of the social stratification is the proletariat. Below it there is no class and therefore emancipation of the proletariat will, in fact, be the emancipation of mankind. Marx accepts the right of the bourgeoisie to fight the final war. But for the proletariat the battle is for its very survival and it has to win.

The revolutions of the proletariat will differ in kind from all past revolutions. All the revolutions of the past were accomplished by minorities for the benefit of minorities. The revolution of the proletariat will be accomplished by the vast majority for the benefit of all. The proletarian revolution will, therefore, mark the end of classes and of the antagonistic character of capitalist society. This would mean that the private ownership of property will be abolished. The proletariat will jointly own means of production and distribute the produce according to the needs of the members of the society. This stage is called the stage of dictatorship of proletariat. This stage will later on convert into a stateless society where the communist system will finally be established in the society. This will also end all kinds of social classes and of all kinds of class conflicts for future. This will also mean de-alienation of the proletariat. Since the concept of alienation is now regarded as one of the main ideas of Marxism, after completing Check Your Progress 3, you will also learn a little about this concept, and its relevance to Marxian analysis of class conflict.

Check Your Progress 3

1) Discuss the main features of communism in three lines.

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2) Mark True and False against each of the following sentences.

- a) The private ownership of property will not be abolished True/False
in communism.
- b) Communism is characterised by stateless and classless society. True/False

4.4 MARX'S CONCEPT OF ALIENATION

Alienation literally means “separation from”. This term is often used in literature and Marx has given it a sociological meaning. Marx has conceived of alienation as a phenomenon related to the structure of those societies in which the producer is divorced from the means of production and in which “dead labour” (capital) dominates “living labour” (the worker). Let us take an example of a shoemaker in a factory. A shoemaker manufactures shoes but cannot use them for himself. His

creation thus becomes an object which is separate from him. It becomes an entity which is separate from its creator. He makes shoes not because making shoes satisfies merely his urge to work and create. He does so to earn his living.

For a worker this 'objectification' becomes more so because the process of production in a factory is decided into several parts and his job may be only a tiny part of the whole. Since he produces only one part of the whole, his work is mechanical and therefore he loses his creativity.

A systematic elaboration of the concept appears in *Capital* under the heading "Fetishism of commodities and money". But the ethical germ of this conception can be found as early as 1844, when Marx unequivocally rejected and condemned "the state" and "money", and invested the proletariat with the "historical mission" of emancipating society as a whole. In Marx's sense alienation is an action through which (or a state in which) a person, a group, an institution, or a society becomes (or remains) alien

- a) to the results or products of its own activity (and to the activity itself), and/or
- b) to the nature in which it lives, and/or
- c) to other human beings, and in addition and through any or all of
- d) to itself (to its own historically created human possibilities). Alienation is always self-alienation, i.e., one's alienation from oneself through one's own activity. To quote Gajo Petrovic (1983: 10) we can say, "And self-alienation is not just one among the forms of alienation, but the very essence and basic structure of alienation. It is not merely a descriptive concept, it is also an appeal, or a call for a revolutionary change of the world".

Mere criticism of alienation was not the intention of Marx. His aim was to clear the path for a radical revolution and for accomplishing communism understood as "the re-integration of one's return to oneself, the supersession of one's self-alienation". Mere abolition of private property cannot bring about de-alienation of economic and social life. This situation of the worker, or the producer does not alter by transforming private property into state property. Some forms of alienation in capitalist production have their roots in the nature of the means of production and the related division of social labour, so that they cannot be eliminated by a mere change in the form of managing production.

Far from being an eternal fact of social life, the division of society into mutually interdependent and conflicting spheres (economy, politics, laws, arts, morals, religion, etc.), and the predominance of the economic sphere, are, according to Marx, characteristics of a self-alienated society. The de-alienation of society is therefore impossible without the abolition of the alienation of different human activities from each other.

Alienation in the Marxian sense of the term cannot be overcome by the reorganisation of the economy, however radical the programme of such

transformation may be. Alienation of the society and of the individual are integrally connected. Therefore, the de-alienation of neither can be carried out without the other, nor can one be reduced to the other.

The concept of alienation is a key tool of analysis in Marx's thought. According to Marx, one had always been self-alienated thus far. The bourgeoisie relations of production are the last antagonistic form of the social process of production causing alienation. At the same time, the production forces developing in the womb of bourgeoisie society create the material conditions for the solution of that antagonism and alienation. This social formation constitutes, therefore, the closing chapter of the "prehistoric" stage of human society. Our discussion of the concept of alienation closes Unit 4 on Class and Class Conflict. Before moving on to a summary of the unit, let us complete Activity 3.

Activity 3

Is there a word for alienation in your mother-tongue? If yes, provide the term and explain it by giving examples from your day-to-day life.

4.5 LET US SUM UP

In this unit we have discussed the concept of class and class conflict in the history of development of society as given by Karl Marx. He defined class in terms of people's relationship to the means of production and their class-consciousness. In Marxian terms, the history of society, so far, is the history of class struggle. This means that ever since the social inequality and exploitation started in human history, that is, beginning from slavery system, society has been divided into mutually warring classes of Haves and Have-nots. This successive class conflict and change in mode of production has led to change in the stages of society from slavery to feudalistic and feudalistic to capitalistic system. The final social revolution would transform the capitalistic system into communist system where there would be no more classes, social inequality and class conflict. In other words, there will be de-alienation of the proletariat.

4.6 REFERENCES

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4.7 SPECIMEN ANSWERS TO CHECK YOUR PROGRESS

Check Your Progress 1

- 1) It comprises people sharing same relationship with the means of production and having similar consciousness regarding their class interests.

- 2) A social class can be determined by two major criteria, namely,
 - a) Objective, and
 - b) subjective criteria.

Check Your Progress 2

- 1) Five stages of society as given by Marx are:
 - 1) Primitive-Communal System
 - 2) Slavery
 - 3) Feudalism
 - 4) Capitalism
 - 5) Communism.
- 2)
 - a) True
 - b) True

Check Your Progress 3

- 1) It will be characterised by a classless society, devoid of private ownership of means of production. There will be no stateless society.
- 2)
 - a) False
 - b) True