Some Remarks on Marx’s Philosophy and Philosophical Methodology

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Introduction

Marx is famously one of the three founding figures of modern sociology, along with Emile Durkheim and Max Weber. Unlike the latter two, Marx’s influence extends far beyond the occasionally narrow confines of the academy. Many theorists resent the limited impact their ideas have on the actual world. Marx has posthumously experienced the inverse problem. Marxist theories and themes have been appropriated by political groups and activists around the world; yet it is often unclear how much they actually draw upon Marx as an intellectual and how much they simply invoke aspects his legacy.

One of the chief sources of this confusion is it is unclear how exactly one can “approach” socio-political problems from a Marxist perspective. Despite Althusser’s bombastic claims that Marx discovered the “science of history”, there is no method which one can easily discern from his works and then apply to changing circumstances.\(^1\) His methodological comments are scattered through a huge number of works; sometimes prominently available and other times buried deep within a text and even in footnotes.\(^2\) Also problematic is what exactly constitutes Marx’s mature method. In his earlier, more philosophical works, Marx (sometimes in collaboration with Engels) wrote extensively about epistemological issues and presented his materialist theories on history in substantial detail. But how much of these theoretical approaches was retained by the later, more economically oriented Marx, and how much was dropped, is a matter of debate.\(^3\)

My paper will examine these methodological problems in some detail with the aim of determining whether Marx did indeed develop a “science” of history and society. Of course this will involve discussing what exactly constitutes a “science.” It is all too easy to invoke the credibility of the scientific method to give any methodological approach tenability. But what “science” is and whether or not it actually provides any knowledge about the “real” world is itself a matter of contention. What does it even mean to have “knowledge” of a phenomena like society or the inner workings of the capitalist mode of production?

To try and provide some context for my examination I will precede my analysis of Marx’s methodology with an examination of his predecessors. I feel this contribute to understanding Marx better because there will be some sense of the epistemological frameworks he reacted very strongly against. It will also provide some insight into many of the theoretical


\(^2\) This is often the case in *Capital*.

\(^3\) Althusser’s book *For Marx* is a classic, which focuses on this controversy. See Louis Althusser. *For Marx*. (New York, NY: Verso Press, 2005)
presuppositions of liberal thought. Liberalism appropriated many of the philosophical concepts Marx criticized to defend the burgeoning capitalist order. Indeed, many thinkers regard liberalism and the scientific method as inextricably entwined. It will be useful to examine whether this is so.

I will then turn to examining Marx’s theoretical method and the way he later applied it to economic phenomena. This will involve briefly looking at Marx’s earlier and more philosophical writings, and then turning to the mature texts to see whether and how the methodology he developed in his youth is operating within his later critiques of political economy. Unlike Althusser, my argument will be that the later Marx did not “break” decisively with his youthful theories. Instead he largely assimilated his earlier ideas within a vastly more intricate and sophisticated framework; indeed, one might say he refined his earlier and more ambiguous philosophical ideas into more precise economic ones. This gave his analyses of political and economic phenomena a virtually unparalleled combination of depth and precision. But does this mean he truly developed an objective a method, or indeed a “science” of history and/or society?

My paper will conclude with two parts. In the first I will examine the age old problem of knowledge and the contemporary debates surrounding whether objectivity is possible. I will briefly examine the current state of “scientific” methodologies and suggest that they are unable to give objective knowledge about phenomena. Because so much of liberal and neo-liberal economic thought draws upon the credibility of science—indeed Marshall and Friedman are both fixated with it—I will suggest they approach the subject of political economy from a very shallow perspective. This shallowness does not just have academic consequences; the ideological and social impact of these mistakes have been profound and should be countered. In this respect I will argue Marx has made an indelible and decisive contribution to political economy and that we still have a great deal to learn from him. This is more true than ever during this period of persistent economic crises.

But in the second part I will suggest that Marx (or perhaps Marxists?) reach too far in claiming that one could apply this theoretical problematic to obtain objective knowledge to questions like the nature of human consciousness and value. This is because Marx did not probe deeply enough to actually ask ontological questions about the primordial nature of human beings, their relationship with the world, the nature of meaning, and the problems of time and how that relates to history. These are not pedantic questions. As Marx himself would maintain, to understand the world means to understand it as totality. One cannot evade ontological questions when dealing with issues in political economy.

I will therefore try to show how an ontologically minded approach can contribute to a critique of political economy. Negatively, I will argue one must ask them to understand the foundational ideological errors that liberalism, and the capitalist system, are premised on. More productively, I will argue that asking these questions is foundational to understanding how it is that we reify the world into commodities and develop spheres of “meaning” within which some “things” come to have more value than others.
This is not entirely novel. Indeed, many contemporary Marxists, including such esteemed figures as Badiou and Zizek have approached ontological questions seriously and persistently.\footnote{See Alain Badiou. \textit{Being and Event.} (New York, NY: Continuum, 2005) and Slavoj Zizek. \textit{The Parallax View.} (Boston, MA: MIT Press, 2006) for their most advanced treatments of the ontological problem.} However, their approaches are almost exclusively philosophical and political. I’m hoping this essay will try to show how ontological questioning can contribute to the field of political economy and Marxist economic analyses. Hopefully this paper will take a few useful steps in that direction.

**The Problem of Knowledge in Post-Enlightenment Thought**

Enlightenment thinkers tended to be fixated on the problem of knowledge; indeed, this fixation was one of the reasons they could produce so much that was instrumentally useful and yet simultaneously so much narrower than Ancient thought. It is important to not characterize this narrowness in a reactionary manner—it was the very confines which the modern philosophers drew around “knowledge” that channelled its capabilities. The philosopher who epitomized this switch was not Descartes as is typically assumed. As I will show, it was Hobbes who first approached the human being and the social world with the techniques of modern science. Hobbes was the greatest pre-Kantian thinker because he was the first philosopher to accept the epistemological problems of modernity and spell out their ethical and political ramifications. In effect he developed an entire worldview, something very few thinkers before or since him have accomplished.

Hobbes was scathingly critical of the idea that human life was oriented to any transcendent goal, or to use the classical term. He lambasted Ancient philosophy for developing words to apply to empty concepts. And his criticisms were not just academic; he felt that by ascribing some goals to human life beyond what could be demonstrated empirically one created problems about which, to invoke Friedmann, men “could only fight.”\footnote{See Milton Friedman. “The Methodology of Positive Economics,” in \textit{Essays in Positive Economics.} (Chicago, IL: University of Chicago Press, 1953).} What could be demonstrated to Hobbes was that human beings were causally propelled by forces beyond their control to lust after desire after desire. It made no sense to morally criticize this since it was simply a fact of life; to Hobbes we were pushed by causality to desire food, sex, immortality, control, and “power after power.” Rather than try to alter the way we are, he felt political theory had to wrestle with these forces and find a way to channel them so that on balance most people’s desires were achieved. Political “science,” like all science, involved correctly applying the right amount and kind of pressure in a given situation. This is what leads him to his conclusion that a mighty sovereign, the Leviathan, is the only figure which can adequately create the space for individuals to pursue their separate desires while minimally interfering with the lives of other. Control was what is necessary for all industry, commerce arts etc. to flourish.

As he put it in the:

“In such condition [of chaos in the state of nature], there is no place for Industry; because the fruit thereof is uncertain; and consequently no Culture of the Earth; no Navigation, nor use of the commodities that may be imported by Seas; no
commodious buildings, no Instruments of moving, and removing such things as requires much force, no Knowledge of the face of the Earth; no account of Time; no Arts; no Letters; no Society…”

Hobbes’ views might seem idiosyncratic to us today. But as I will show, they are in fact simply the consistent application of modern conjectures about knowledge and the world most of us uncritically adhere to. That Hobbes was willing to spell these out is a testament to his profound intellectual courage. But before we examine this let us turn to some thinkers who were more Marx’s contemporaries.

The first philosopher to probe as deeply as the Greeks was Kant, who was able to synthesize rational and empirical thought and thus develop a new conception of reason as essentially critical and limited. What Hobbes more or less uncritically accepted as a fact, Kant developed into a consistent and plausible theory. On a Kantian account objective knowledge was possible, not because we could access the actual world “in and of itself,” but because we all possessed the same a priori modes of reasoning. In pure reasoning this could only lead to the skeptical conclusion that knowledge of a “phenomenal” world constituted by consciousness was possible, but knowledge of the “noumenal” world of “things in and of themselves” was beyond the capability of human beings. This included knowledge of things such as the true nature of the world, freedom, God, and the origins of the world. Even space and time on a Kantian account could not be regarded as objectively existent since they were merely modes by which we organized sensory data; there was no way of knowing whether the source of this data in the world itself was not truly ordered in some radically different form. That being said, Kant went on to argue that the subject has a practical obligation to postulate the existence of freedom, God, and the immortal soul in the. Only in this way, he argued, could we act morally. Finally, in the he further argued that these notions are needed for reason to make sense of the empirical world since only they can provide a teleological orientation for existence. Otherwise, everything could only be conceived as simple matter in motion.

For the first time in Western thought subjectivity entered thought as a credible ontological starting point for knowledge; and not just “objective knowledge”, but as we have seen, moral and aesthetic knowledge as well. Because no one has been able to decisively break out of what Habermas calls the “philosophy of the subject” in post-Kantian thought, all subsequent thinkers have to some degree worked within this problematic. Even those thinkers who struggled to evade the critical and skeptical conclusions Kant himself arrived at were none the less forced to wrestle with the problem of consciousness. The first and most important thinker to do so was Hegel, who would not coincidentally have an immense impact on Marx and Marxist thought.

Hegel attempted to go beyond Kant by grasping reality “not only as substance, but also as subject.” He felt it was possible to reconcile Ancient and early modern thought with the Kantian revolution by illustrating that both the subject and the external world were actually part of a

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10 See Jurgen Habermas. The Philosophical Discourse of Modernity. (Boston, MA: MIT Press, 1987)
single totality which he gave the name spirit, or in German. At more basic levels of understanding, might be considered analogous to consciousness, though at higher ones this analogy breaks down. To understand the subject, according to Hegel, one must systematically grasp the historical circumstances which led to develop into its particular form. This meant understanding as not something static which applies “objective” categories onto the world, but as something dynamic which transforms through what Hegel characterized as a dialectical process.¹¹

is the introduction to this systematic understanding of the dialectic because it traces the necessary steps has endured in its journey towards absolute knowledge. Once someone like Hegel the philosopher can reflectively understands this process, it is possible to grasp the inner logic which runs through all of reality. This is the purpose of the, which Marx was later to draw upon very heavily. The was intended to show, objectively, how the finite way which we have grasped reality is not only limited but actually false.¹² For instance, Hegel speaks of how all phenomena eventually defy the limits quantifiability. Quantitative categories of understanding therefore give way to qualitative ones; and of course the two are later to be reconciled together in a higher synthesis by “negating the negation” of our previous understanding. Traditionally, the ultimate Hegelian synthesis is understood as realizing that God, and God alone, is and was the beginning and end of all understanding and reality. This expands on Kant’s own more modest claims in the, and evidence of why later critics such as Marx would accuse Hegel of mystification. But how does this relate back to modernity and the scientific method? What makes Kant, and then Hegel, such exemplary figures of the modern mindset?

With Kant it is easy enough to see how the restrictions he placed on knowledge for the sake of obtaining “objective knowledge” are consistent with scientific and also liberal doctrines. Kant made systematic what Hobbes had seen centuries before. Unlike the Ancients, Kant argued it was not possible to step beyond the boundaries of one’s own subjectivity to transform oneself into something ontologically novel. We were stuck with man as a rational, calculative animal. He profoundly differed with Hobbes over the capacity—indeed the necessity—of reason to understand and produce objects it could not affirm. But he bound thought more firmly than ever before within the individual subject and his/her needs. Indeed, he provided new theoretical concepts through which we could understand how human beings break the world into differing parts and even different spheres of reasoning. Within these different spheres we assign separate categories to phenomena in order to benefit and exist within them.

Hegel’s great innovation was to incorporate history into the philosophy of the subject. But he did so uncritically because of his metaphysical pretensions. Because he has to accept reality as it “is” in order to develop a metaphysical system, Hegel fell into the trap of assuming that not only did history follow a determined course, but that its developments were morally valid. This idealistic and optimistic attitude was most demonstrated in his where Hegel effectively offered a sustained defence of the emerging bourgeois state.¹³ He argued that this new state was the highest form of human social life that could possibly exist; literally the embodiment of God’s on earth.

What makes Hegel such a modern thinker is his neutral acceptance of the content of knowledge - he could only contradict himself by critiquing the established order of things and the way they were understood by everyday people. Like any other scientist, Hegel was not concerned with the rightness or wrongness of the phenomena he encountered. Because he was a brilliant “scientist” Hegel was able to give his subject the appearance of inexorable necessity by couching it in the dignity of metaphysical terminology. But this is where his errors begin.

Marx would later produce a scathing critique of this objectivising proclivity in Hegel; saying he merely accepted the state as “it exists in fact” without truly understanding it. This highly observant criticism, which appears in the very early is evidence of Marx’s youthful attempts to break away from the theoretical confines of his predecessors. Unlike Hegel, Marx did not just wish to understand society and the way it operated. He examined it with the intent of transforming it, to paraphrase the famous . In these early works we witness the primitive beginnings of Marx’s materialist methodology, which we will now examine in some detail.

**Marx’s Materialism: A ‘Science’ of History?**

Marx’s earliest innovation was to argue that consciousness was not an idealised, transcendent object. Instead both the form and content of consciousness were material. What does this mean? The young Marx helped us to consider how the real world of actual social relations themselves might constitute consciousness. This was an immense theoretical innovation. No longer was it nature, transcendent or in Hegel’s “Absolute mind” that was responsible for the consciousness of man and the way he understood the world. Now it was man as a social being who was responsible for the consciousness of man. As Marx put in in the :

“Does it require deep intuition to comprehend that man’s ideas, views and conceptions, in one word, man’s consciousness, changes with every change in the conditions of his material existence, in his social relations and in his social life? What else does the history of ideas prove, than that intellectual production changes its character in proportion as material production is changed. The ruling ideas of each age have ever been the ideas of its ruling class.”

The influence of this shift can not be overestimated. For its novelty and importance, Marx deserves to be credited as the founder of sociology for this profound insight. He undoubtedly drew upon Hegelian themes, especially Hegel’s emphasis on history and the idea that no historical epoch is capable of surpassing its own ideas remaining unchanged. To surpass such a horizon means to be dialectically transformed, Marx’s appropriation of this dialectical method, and Hegelian ideas about the logic of transformation, were necessary for him to intellectually progress. However, he radically stripped the dialectical method of its idealist metaphysical pretensions. Marx instead went about analyzing historical transformations through focusing on the actual material relations which existed between social groups. Which brings us to his focus on political economy.

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15 Marx, *Early Writings*.
Because he was a materialist, it was natural for Marx to focus his analyses on the way that human beings produced and distributed those objects, which are the actual material of the human social world. After a brief period criticizing Hegelian political theory and German philosophy, he quickly turned to political economy beginning with an exhaustive examination and critique of the British political economists. This was undeniably a developmental period in his thought, as indicated by the eclectic brilliance of the and the already mentioned 17 A key concept that was developed in this early works was the idea of “alienation.” Alienation, to Marx, was the product of the unnatural position modern man found himself in. The industrial labour process had reduced human beings into meaningless cogs in the workings of a vast machine, a vulgarization of man’s species-being as a productive being which constitutes itself through what it creates. Modern industrial labourers, by contrast, were completely separated from what they were producing. Industrialization also was responsible for the developing alienated social relationships of capitalism. 18 The most famous Marxist example is the antagonistic relationship which existed between the proletariat and the emerging bourgeoisie. But Marx also argued that alienated labourers became involved in intra-class conflicts because they were forced to compete with one another for jobs and commodities despite living in a society which produced a surplus of goods.

These works indicate a mind struggling to evolve beyond the imprecise confines of Hegelian and philosophical concepts. Many, such as the concept of species-being, were dropped by Marx later in his life. However, we should not be tempted to assume there was some “break” with these early works after which Marx ceased to be a philosopher and became a scientifically minded economist. As we shall see in our treatment of his mature method, many of his earlier concepts and insights still played a decisive role in shaping the older Marx’s thought.

Unexpectedly it is in the earlier and unpublished and not that Marx most clearly and systematically details his method of analysis. His later masterpiece is an epochal attempt to analyze and critique the historical development of modern industrial capitalism. But it is dependent on the theoretical problematic developed in the, where all his earlier and more scattered ideas were integrated and refined into a true theory of dialectical materialism.

The following is an exemplary quote from the Introduction to the.

“…all epochs of production have certain common traits, common characteristics. Production in general is an abstraction, but a rational abstraction in so far as it really brings out and fixes the common element and thus saves us repetition. Still, this general category, this common element sifted out by comparison, is itself segmented many times over and splits into different determinations. Some determinations belong to all epochs, others only to a few. Some determinations will be shared by the most modern epoch and the most ancient. No production will be thinkable without them; however even though the most developed languages have laws and characteristics in common with the least developed, never the less, just those things which determine their development, i.e, the elements which are not general and common, must be separated out from the

17 See Marx, Early Writings.
18 See the “Economic and Philosophical Manuscripts 1844” in Marx, Early Writings
determinations valid for production as such, so that in their unity—which arises already from the identity of the subject, humanity, and of the object, nature,—their essential difference is not forgotten. The whole profundity of those modern economists who demonstrate the eternity and harmoniousness of the existing social relations lies in this forgetting.”

In this lengthy paragraph, Marx spells out in clear language a great deal of his methodological approach. To understand something like “production,” one must abstract from historical particularities in order to capture its general character. But how to go about doing that? To simplify somewhat, as is common with explaining the method of the hard sciences, we might characterize Marx’s as a three step method.

Step One is to examine the actual way specific peoples produce. Once you have a number of case studies it is possible to separate out the generalities from the particularities. This sifting process is necessary or else conceiving a general process like “production” would be impossible. We would only know the specific and contingent techniques by which differing groups produce goods. Step Two is to develop an abstract but universal theory of a concept—like production—within thought. This method of abstraction involves assembling the general features of a given phenomena like “production” together and integrate them to form an abstract theoretical concept. The theoretical concepts one develops should ideally be applicable anywhere a given phenomena exists. Finally, we must take the Third and final step back from conceptual thought to the “actual world.” This involves applying the theoretical concepts one has developed back onto actual phenomena, so that one can understand them concretely. This is known as understanding the concrete-in-thought. What differentiates understanding the “concrete-in-thought” from mere historical observation is that one now grasps the internal logic of a phenomena rather than just its external appearance. To bring it down to earth, mere historical observation would only understand “production” as modern vulgar economists do, as an eternal set of harmonious relations which can be mathematically expressed. This is because they take contingent circumstances to be universal ones. Understanding production concretely involves grasping the internal historical dynamics which led to the development of a particular mode of producing goods—or as Marx later put it “commodities.” This gives us a richer and more total understanding of the social world of material relations. Or as Marx put it in the “In the succession of economic categories, as in any other historical, social science, it must not be forgotten that their subject—here, modern bourgeois society—is always what is given, in the head as well as in reality, and that these categories therefore express the forms of being, the characteristics of existence, and often only the individual sides of this specific society, this subject, and that

therefore this society by no means begins only at the point where one can speak of it; this holds for science as well.”

The final step is key, because it is what makes Marx more than just a simple academic or a philosopher like Hegel. Hegel took the concept, the “idea”, to be the end of science. Not Marx. He was not interested in merely understanding his subject at a theoretical level. Because the object of thought was not just to understand the world “but to change it,” one had to apply the concepts of thought back to the empirical social world with the intention of critiquing it. This also brings us to what differentiates Marx’s dialectical materialism from positivistic science or idealistic philosophy.

As mentioned, in his worse moments Hegel was no better than a vulgar scientist because he neutrally accepted reality as he found it, as it “actually was.” This was tied to his optimistic dialectical approach. In a Hegelian universe, all conflicts which drove history were ultimately ideal, or we might say “conceptual”, conflicts. Because material inequities were not the foundation of human strife, it was easy for Hegel to assume that all conceptual conflicts could and would ultimately be reconciled through some higher synthesis that would preserve the insights of all that had come before. Politically, this meant that the liberal-capitalist state which Hegel took as the end of history was, in Leibnizian terms, the best of all possible worlds.

Marx’s dialectical theory was considerably more sophisticated. He also saw conflict as the engine of history; but not ideal conflicts. Instead, it was material conflicts between social groups which drove history foreword. Because he progressed from the actual, to the theoretical, and then back to the concrete, Marx could see that real history was actually considerably more complex than the idealized narrative Hegel proffered. Different historical epochs were highly differentiated because in each one the mode of producing and distributing goods was vastly different from the other. And because the economic mode of production chiefly - but not exclusively - determined the super structural features of ideology, law and politics in a society these were vastly different across historical epochs as well.

As put by Ben Fine and Alfredo Saad-Fillho:

“…Marx’s method focuses upon historical change. In the preface to the and the introduction to the Marx famously summarises his account of the relationship between structures of production, social relations and historical change…There are overlapping relationships of mutual determination between technology, society, and history (and other factors) but in ways that are invariably influenced by the mode of social organization.”

To give some examples: in slave societies, indentured labourers produced most of society’s material goods and upper classes appropriated them. This was justified along various racial and cultural lines. In the Feudal era society became more stratified as various other middling groups emerged. This would be important when Marx began analyzing the emergence of production and production modes.
of the modern bourgeoisie. But Feudal society largely centered around tension between land-lords and serfs. Serfs laboured on vast tracts of agricultural land, and their produce was appropriated by land-lords such as Dukes, Earls, etc. who employed it to enhance and protect their own individual and class interests. The ideological justification given for this society was primarily religious and moral; God had placed those who were more fit to rule in positions of authority. Traces of the old Feudal society persisted throughout the 19th century, but Marx was well aware that its time had passed. Each society had eventually given into its internal dialectical tensions and been replaced with another, more advanced form of society. Marx argued that by the 19th century that the capitalist mode of production was becoming the economic foundation of a new type of society. This society was replacing Feudalism, and bringing with it both unprecedented wonders and horrors.

There is no space in this methodologically oriented paper to devote significant time to the substance of Marx’s analysis and critique of bourgeois capitalism. But I will briefly look at the inner structure of to try and show how he applied his methodological approach to a critique of capitalist political economy.

**Marx’s Method Applied to a Critique of Capitalist Political Economy**

Unsurprisingly begins with an examination of an apparently very simple subject: the commodity. In capitalism we live in a world of commodities: computers, games, chocolate bars, fast food, televisions and on and on. But what is a commodity? What gives it value?

Early modern political economists such as the mercantilists and to some extent the physiocrats were largely disinterested in questioning the notion of value with any persistence. The first person to do so, by Marx’s own acknowledgement, was Adam Smith, who not coincidentally began the with a chapter on the production of pins, a very basic commodity if ever there was one. Smith developed what has become known as the adding up theory of value, which maintained that the value of a commodity could be quantified by considering the value-added of differing forces. This approach was highly unsystematic, a problem which was rectified by David Ricardo, who was the second great influence on Marx next to Hegel. Ricardo argued that all value originated from the labour which was embodied within it.

“That this (labour) is really the foundation of the exchangeable value of all things, excepting those which cannot be increased by human industry, is a doctrine of the utmost importance in political economy; for from no source do so many errors, and so much difference of opinion in that science proceed, as from the vague ideas which are attached to the word value. If the quantity of labour realized in commodities, regulate their exchangeable value, every increase of the quantity of labour must augment the value of that commodity on which it is exercised, as every diminution must lower it.”

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22 Indeed, this was intellectually apparent even by Ricardo’s time.
Marx appropriated this insight and developed it to an unparalleled level of sophistication in his work. He argued that traditional political economy saw value as originating from two sources: a commodity had an objective "exchange" value, and a subjective "use" value. Modern people tended to fetishize size commodities by only regarding them from this narrow perspective, in abstraction from the world which produced them. Here we see Marx incorporate his earlier arguments about alienation into his now systematic approach. Modern people do not see themselves as the producers of commodities and their value.

“If I state that coats or boots stand in a relation to linen because the latter is the universal incarnation of abstract human labour, the absurdity of the statement is self-evident. Nevertheless, when the producers of coats and boots bring these commodities into a relation with linen, or with gold or silver (and this makes no difference here), as the universal equivalent, the relation between their own private labour and the collective labour appears to them in exactly this absurd form. The categories of bourgeois economics consist precisely of forms of this kind. They are forms of thought which are socially valid, and therefore objective, for the relations of production belonging to this historically determined mode of social production i.e commodity production. The whole mystery of commodities, all the magic and necromancy that surrounds the products of labour on the basis of commodity production, vanishes therefore as soon as we come to other forms of production.”

Against this vulgar conception Marx maintained that underlying the exchange and utility concepts of value was a social qualitative and quantitative relationship which existed between labourers and owners. To understand the value of a commodity we cannot just examine it at the superficial level of an interaction between buyers and sellers. We need to understand the dialectical circumstances by which a commodity was produced.

Marx understood the value of a commodity as ultimately arising from the socially necessary labour time that was invested in it. A commodity’s value could be measured by looking at how much labour power had been invested in it over time, taking into account also the labour invested in the tools and machines a labourer used in the production process. This conceptualization of the labour theory of value was an economic law which held for all given times and places. But what differentiated the capitalist mode of production from those of other epochs?

At an ideological level Marx felt that the doctrines of liberalism, which had replaced the mystical-religious doctrines of the Feudal era, were intended to justify the now naked exploitation which occurred in the productive sphere. Rather than basing their right to ownership of the means of a production on a mystical basis, capitalists appealed to the law and the new socio-political norms which regarded all persons as property owners who engaged in nominally “free” exchanges with one another. This included contracts whereby labourers agreed to sell their labour power for a given duration in return for monetary compensation from capitalists. What happened in fact was the exploitation of one class which had little power by another which had a

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great deal. To understand this one needed to see past the “actual” exchange, conceptualize the social forces that are internally playing themselves out, and apply them back onto the concrete instance. As put by Bukharin:

“The example is that in commodity market relations there are hidden production relations. Any connection between producers who meet in the process of exchange presupposes the individual labour of the producers having already become elements of the combined labour of a social whole. Thus production is hidden behind exchange. Production relations are hidden behind exchange relations, the interrelation of producers is hidden behind the interrelation of commodities.”  

Bukharin’s is a good example of how one can go from uncritically regarding the exchange between labourer and capitalist as simply a neutral phenomena involving the transfer of material commodities to understanding it as one saturated with power relations and characterized by exploitation. This is the Marxist method in action, highlighting the dialectical tensions inherent within even a simple phenomena to illustrate how they serve to reproduce a given social structure.

As a class, Marx argued that capitalists were interested in appropriating labour power to work on the new industrial machines to produce surplus value. As Adam Smith nearly a century before had understood, industrialization and the efficient division of labour it entailed would vastly increase the productive capacity of both individual firms and society as a whole.

“The division of labour, however, so far as it can be introduced, occasions, in every art, a proportionable increase of the productive powers of labour. The separation of different trades and employments from one another seems to have taken place in consequence of this advantage. This separation, too, is generally called furthest in those countries which enjoy the highest degree of industry and improvement; what is the work of one man in a rude state of society being generally that of several in an improved one.”

When labour was divided efficiently and empowered through machinery it could quickly and easily produce an immense surplus of value which could quickly reimburse the capitalist for his or her initial investments in labour and machines. It was in the interest of capitalists to then compensate their employees as little as possible for their labour, even though this labouring was responsible for adding almost all the value to the saleable commodities. Because their ownership of the means of production and the returns on production was assured by law and the state, capitalists could appropriate the surplus value labour produced and pay labourers less than the value they produced. They could either do this by creating absolute surplus value, for instance by extending the working day, or relative surplus value, for instance improving the technologically efficiency of the production process further so workers are able to produce more at the same wage as before. The degree to which capitalists could create and appropriate surplus value Marx

25 Nicolai Bukhanin. *Imperialism and World Economy.* (Marxists Internet Archive: marxists.org, 2001) at Chapter 1.
called the “rate of exploitation.” He felt that as time went on, the drive of capitalists to both consume and valorize returns on capital would mean they would try and push down wages to the social and physiological minimum possible. This would produce social tensions Marx ultimately hoped might contribute to the overthrow and replacement of the exploitative capitalist mode of production and the social form it reproduced. These tensions might contribute to the social-system reproducing itself, for instance if capitalists succeed in increasing the rate of exploitation and appropriating more absolute or relative surplus value. They might lead to a slight improvement in conditions for workers if they organize sufficiently to push for intra-systemic change. Or the dialectical tensions might lead to the wholesale overthrow of the capitalist mode of production and its total replacement with a more advanced social form.

This is a very simple overview of Marx’s theories on capitalist production as presented in the first Volume of . In the subsequent Volumes he traces the circuits of capital through the market, the immense impact of finance systems as the lubricant of the system, the nature of rent, and distribution relations. As a critique of capitalism the completed work remains without peer, but unfortunately there is no space to focus on those details here. For the purposes of this paper I am only interested in the way Marx’s method is applied to the subject of political economy. So let’s examine the inner logic at work in the Marxist critique of capitalism summarized above.

Marx begins his analysis of capitalism with an analysis of the commodity and the production process because he wished to unpack the inner quantitative and qualitative relations which underpinned bourgeois theories of exchange. Conceived as the mere transfer of equivalences, exchange appears as an un-coerced “free” activity. But if one abstracts from this situation one can conceptualize that it is labour and the process of labouring driven by the relations between labourers, technology, capital, and capitalists– which in fact contributes all the value to any commodities which are being exchanged. Reapplied back to the world our concepts allow us to conceive of exchange concretely. We can now see that what on the surface appeared as a neutral exchange of equivalences is in fact a process characterized by inner dialectical tensions.

As Marx put it in the Grundrisse:

“This social bond is expressed in exchange value, by means of which alone each individual’s own activity or his product becomes an activity and a product for him; he must produce a general product-exchange value, or, the latter isolated for itself and individualized, money. On the other side, the power which each individual exercises over the activity of others and over social wealth exists in him as the owner of exchange values, of money. The individual carriers his social power, as well as his bond with society, in his pocket. Activity, regardless of its individual manifestation, and the product of activity, regardless of its particular make-up, are always exchange value, and exchange value is a generality, in which all individuality and particularity are negated and extinguished.”

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28 Marx, Grundrisse, a 156-157.
So to understand exchange one must understand the social-relations which lie behind it. In the modern era the crucial relation between labour and capital is one of exploitation, which produces systematic tensions across society because they result in real world conflicts between and within classes.

In a nutshell, this is how the Marxist method is applied to analyzing and critiquing the exchange relation and unpacking the inner logic behind its seemingly neutral façade. Like Kant and Hegel, Marx understood the necessity of idealized conceptualization. If one does not have a concept of what gives the commodity value at any given time then it would be impossible to understand exchange either generally or critically. But unlike the former thinkers Marx starts and ends his methodological approach with the material world. Ones concepts are derived from and then applied back to actual relations between material things in the world. For this reason, Marx also felt we cannot regard dialectical tensions as conceptual and therefore resolvable through ideal synthesis. Because a dialectical conflict is one between actual material relations, one or many of the conflicting forces will necessarily be overcome and replaced in the historical process. The task of an intellectual is to understand this inner motion and seek to change the world in accordance with its logic.

And this is where we start to find problems with Marx’s methodological approach. By focusing on actual material relations he undoubtedly took tremendous steps towards creating what could be called a “science” of history and society. But what do we mean when we speak about “science?” What does “science” have to teach us that philosophy cannot? And what abstractions are entailed in constituting something as a “science?” What do we lose by thinking “scientifically?”

The Problem of “Science” and Materialism Generally

Kant and Hegel were Marx’s most prominent methodological predecessors. Both developed sophisticated idealisms which remain hugely influential. But contemporary debates about the nature of “science” and the possibility of “objective knowledge” have descended from these somewhat lofty heights. This is in no small part due to the historical materialism Marx made so prominent in the history of thought; and the idea that the very content of consciousness is determined by society. Marx’s intellectual descendants would carry this radical idea foreword into every area of human knowledge, and not even Marx would remain unscathed by the impact of these ever more radical critiques.

The trend in early Twentieth Century thought was to develop ever more radical and vulgar positivist epistemologies and apply them to every branch of human including science, politics, and economics. These new positivist epistemologies had two objectives. The first and more theoretical was to develop a completely logical language that could serve as an ontological ideal type against which to assess the validity of propositions. The second was to advance the prominence of the “scientific” method and to militate against methods which were unscientific. The impact of the early logical positivists beyond philosophy was immense; many important figures in diverse disciplines appropriated their methods and attitude. Some prominent economists who were deeply influenced by logical positivism include Ludwig von Mises, Frederich Hayek, and Milton Friedman. These figures applied the “logical” method to defend the liberal-capitalist order and critique alternative conceptions.
Put simply, this involved focusing on relations which could be empirically verified as quantifiable facts. These figures felt that qualitative relationships, such as the exploitative relation which existed between labour and capital, were not ones which could be verified and were therefore nonsensical concepts. Positivist thinking was also consciously undialectical. Because dialectical thinking focused on the dynamic way relations changed in both form and substance it was antithetical to conceiving the world as a fixed set of “facts“. The “facts” which positivist minded economists focused on were exchange relations; the quantifiable transfer of commodities and values from one hand to another. They were largely unconcerned with the production process except at an instrumental level. Production was only an object of study when one wished to measure how to increase marginal efficiency; in Marxist terms how to increase the appropriation of relative surplus value. The qualitative aspect of production, how workers became alienated from the commodities they produced and each other etc., was nonsensical on this account because it was not something which could be empirically verified by the positivist methodology.

The positivist methodology remains hugely influential in mainstream vulgar economics; with its fixation on GDP, marginal utility, economically viable distribution relations and so on. Ironically, this influence has persisted in the face of important methodological advances in philosophy and science which have fundamentally undermined the positivist position. It is likely that many neo-liberal economists persist with this methodology in spite of the crippling external challenges for ideological reasons. Logical positivism meshes nicely with the presuppositions of liberalism, for instance the metaphysical arguments traced out earlier in my account of Hobbes. Reductionist positivism must start with the most discrete empirical units conceivable, which is almost invariably the individual and co-extensively their property. Because the total social relations which exist between individuals are not empirically verifiable it is difficult to accord them any precedence over the contingent but quantifiable exchanges which take place between these individuals and their property. The fact that the desires of individuals are shaped by the society they find themselves in, and also that “property” only emerges as part of a complex and often violent historical process, can conveniently be ignored as unrelated to the facts at had. These apparently methodological issues about what to accord priority and what to ignore suddenly have immense ideological effect. The narrowness of the logical positivist method results in the validation of capitalist exchanges because this method cannot even conceive the exploitation which occurs “behind” these exchanges and makes them possible.

The most significant challenge to positivism and the objectivity of the scientific method came from Martin Heidegger and the later work of Ludwig Wittgenstein. In spite of substantial differences in their respective philosophies, they were united in their insistence that what language could not speak of sensibly about was as or more important than what it could speak about. They pointed to the absent ontological centre of language; Heidegger by emphasizing that language could not answer the most basic question of what it means to “be”, and Wittgenstein by illustrating how any system of thought become circular because each linguistic “rule” must inevitably have some anterior rule prescribing its proper use. This led to the conclusion that the possibility of speaking “objectively” about phenomena, whether empirically or conceptually, was a delusion. As Wittgenstein put it in the:
“This was our paradox: no course of action could be determined by a rule, because any course of action can be made out to accord with a rule. The answer was: if any course of action can be made out to accord with the rule, then it can also be made out to conflict with it. And so there would be neither accord nor conflict here.”

These notions would be carried forward and have a significant impact on the discourse about what constitutes the “scientific method” and indeed whether “objective knowledge” was possible. Even in the hard sciences, new critical historiographies such as the ones developed by Kuhn among others, challenged the idea that scientific “facts” actually referred to objectively existent phenomena. Epistemology suddenly seemed vague and abstract. How could one even discussing “knowing” if one did not even understand what Being was? Existence in general rather than the existence of things becomes a problem. This almost startlingly straightforward problem posed serious problems for any theory that sought “knowledge” of a phenomena. One would have to use some form of language to iterate what one knew. But if language could not iterate what “is”, then what did it iterate? What was meaning and what were its consequences? Could meaning even exist in this context?

The problem of “meaning” was taken up by a huge number of philosophers and theorists in the later 20th century, including not a few Marxists. Some were interested in preserving the objective capacity of language and rationality against what they saw as the intrusion of a radical new form of scepticism. Like all conservative minded thinkers, they were largely reactionary and their work has perhaps had the least impact. Other thinkers tore down the old conjectures with gleeful irreverence. Finally there were those who tried to care a pragmatic middle road between the sceptical approach and the hubristic self-certainty of the old methods. But how does this all apply to the Marxist method? Can it evade the ontological problem? What consequences does the ontological approach have for the problems of political economy?

**Political Economy and the Problem of Objective Knowledge**

Ontology challenges the idea that the categories through which we make sense of “economic phenomena” have any real independent sense. At best we can claim that they are “ontical” categories that have meaning to us only as a very particular and limited way of thinking about “things.” In Kuhnian terms, we might say that economic categories are just “normal” way we frame and discuss these types of problems. But we cannot claim they are “objective” in any way.

One need only look at the way economic theory has evolved to see how the way these problems are framed and also practically resolved has changed dynamically. Ancient and catholic thinkers problematized the very idea of an economic sphere by subordinating it to the needs of the “good” or justice. Mercantilist thought was obsessed with the accumulation of bullion and the balance of trade. Early modern political economy was concerned first and foremost with the problem of value, while modern vulgar economics tends to focus exclusively

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31 See Kuhn.
on quantifiably advantageous exchange and values things according to their calculable marginal utility. Whether one of these approaches is “pragmatically” more useful than any others is a rather banal question, since we then need to ask “useful according to who?” In the end none of them provide an “objective” account of the economy; indeed, one of the features of modern economics is precisely to dismissively abstract away from variables that are not considered important. As put by Marshall:

“The physical sciences made slow progress so long as the brilliant but impatient Greek genius insisted on searching after a single basis for the explanation of all physical phenomena; and their rapid progress in the modern age is due to a breaking up of broad problems into their component parts. Doubtless there is a unity underlying all the forces of nature; but whatever progress has been made towards discovering it, has depended on knowledge obtained by persistent specialized study, no less than on occasional broad surveys of the field of nature as a whole. And similar patient detailed work is required to supply the materials which may enable future ages to understand better than we can the forces that govern the development of the social organism.”32

But what about the Marxist method, which explicitly deals with totalities? Marx tirelessly worked to avoid simplification; indeed, throughout his life he incorporated more and more phenomena into his problematic in an attempt to explain them all. Whether or not he himself succeeded on his own terms is an incidental question. The key question is whether the method he developed can successfully achieve the goals Marx aspired too, even if he fell short in his own work. Can the Marxist, or a Marxist inspired, approach to political economy evade the ontological problem to provide an “objective” account of the economy; indeed, the entirety of human social life? This pressing question is the concern of my final section.

The Benefits and Defects of the Marxist Approach

The best feature of Marx’s dialectical approach is that he sets out to understand and explain totalities. Unlike the logical positivists and “scientists” who developed “pure” methodologies only by abstracting away from phenomena they did not consider important, Marx grasped that one must understand the social world as an interconnected, organic whole. To do this, one needed to grasp the concrete material-historical forces which led to the specific social form of a given place and time. It is all too easy to caricature Marx as some type of rigid economic determinist who maintained that all social forms were constituted by the same forces and laws. Nothing could be further from the truth. Marx was highly sensitive to contingency and historical specificity. All actual social phenomena to Marx were, to use an Althusserian phrase, dialectically “over determined.”33 That is, real phenomena were constituted by multiple and often opposing forces interacting with one another. To characterize Marx as overly focused on economic relations is to reduce him to only a more ambitious vulgar economist.

I have explained Marx’s three-step method of inquiry and contrasted it with its less sophisticated competitors. I will reiterate this one final before moving foreword. Vulgar

33 See Althusser, Reading Capital.
economics rarely goes beyond inquiring about a contingent set of “facts.” Because vulgar economics does not abstract beyond this data to understand a contingent set of facts conceptually it remains blind to the substantial forces underlying phenomena. When our concepts reapplied to empirical phenomena to understand them as the concrete in thought, Marx felt one could grasp the various dialectical tensions which actually drove history foreword, reproduced social forms, and brought about their end.

The sophistication of this approach is profound. No other theorist had as subtle a grasp of dialectics as Marx because he understood how the very presence of an unresolved contradiction can itself be productive. Kant felt that contradictions, or as he put it “antinomies” in pure reason, were in some sense irresolvable except by postulating solutions practically.\textsuperscript{34} Hegel could only wrestle with dialectical contradictions by regarding them only in thought and then mysteriously reconciling them in a false synthesis. Marx grasped that in actual human social life it is not just the moments of reconciliation and cooperation which are responsible for human production and historical development. The efficient and cooperative factory floor which Adam Smith saw is only one part of the story. Vulgar economics, by regarding all production as cooperative and uncoercive is even more blind. Marx understood that the material tensions which exist between people, the way they struggle against and within alienated social conditions, also bring about transformations which can be constitutive of social structures. Moreover, he also grasped the dynamic and strange relation which existed between coercive work conditions and the social cooperation needed to produce material goods. He was by no means exclusively critical of the capitalist order; he was emphatic that it was responsible for producing wonders than any social form to date. As he and Engels put it in the:

“The bourgeoisie, by the rapid improvement of all instruments of production, by the immensely facilitated means of communication, draws all, even the most barbarian, nations into civilization. The cheap prices of commodities are the heavy artillery with which it forces the barbarians' intensely obstinate hatred of foreigners to capitulate. It compels all nations, on pain of extinction, to adopt the bourgeois mode of production; it compels them to introduce what it calls civilization into their midst, i.e., to become bourgeois themselves. In one word, it creates a world after its own image. The bourgeoisie has subjected the country to the rule of the towns. It has created enormous cities, has greatly increased the urban population as compared with the rural, and has thus rescued a considerable part of the population from the idiocy of rural life. Just as it has made the country dependent on the towns, so it has made barbarian and semi-barbarian countries dependent on the civilized ones, nations of peasants on nations of bourgeois, the East on the West.”

The question for all Marxists and critics of liberalism was and remains whether or not one must inevitably accept capitalist bourgeoisie production as necessarily superior to every alternative? The defenders, old and new, of capitalism try to claim that it is the only rational way of producing goods. At best some, like John Stuart Mills or more contemporarily John Rawls, have tried to argue that we are bound to producing capitalistically even if they idealistically feel

\textsuperscript{34} Kant, \textit{Critique of Pure Reason}. 
that we can then be free to distribute wealth according to the principles of equality. These apologists forget that modern productive techniques, indeed modern rationality, have emerged as a result of very contingent historical circumstances. It is impossible to say that we are necessarily compelled, by rationality or what have you, to produce goods in this way. But this is also where Marx’s method runs up against its limitations.

Reading Marx is frequently a bewildering experience. One is often struck by the profundity and insightfulness of his material observations. This is most true when he is exclusively acting a critic of modern political economy. But he is unable to formulate an effective alternative to the contemporary order in no small part because of the vast number of ontological presumptions one uncovers in his work. This is most apparent in his philosophical approach. Marx’s materialism is hugely sophisticated, but its most basic axioms are almost always asserted by him and not defended. This does not detract from the brilliant originality of his argument that the consciousness of man is determined by the social conditions he exists within. But it forces us to question the final truth of this argument, and whether he himself reifies certain artificial categories to make his conjectures tenable outside their ontical limitations. I will try to briefly unpack this through a critique of Marx’s theory of human nature.

To truly understand the human being we need to stop asking about the “human” being. Marx’s inversion of Hegelian, and indeed all philosophical, thought does not take us beyond some very traditional ways of thinking about things. The human being, understood as a being with “consciousness”, whether pure or socially constituted, ideal or material, cannot be the starting point for any theory which aims at truth. One can ask what the point of speaking about “man” or “consciousness” is at all? What is more primordial than the human being or any science is the very fact of existence itself-or as Heidegger would put it Being itself.

As he put it in Being and Time:

“The working out of has been thrown back upon the more original idea concerning the essence and understanding of Being, which first and foremost sustains, drives, and directs the explicit questioning concerning the concept of Being. We strove for the more original apprehension of the basic problem of metaphysics, however, with the intention of making visible the connection between the problem of ground laying and the question concerning the finitude in human beings. Now it appears: we do not even need first to ask about a relationship between the understanding of Being and the finitude in human beings; that it itself is the innermost essence of finitude.”35

This might seem like an entirely useless and abstract way of thinking and questioning. What could ontological thinking possibly contribute to thinking about the problems of political economy beyond obtuse admonitions?

When we think about the way human beings value “things” we must first ask how they come to regard them as “things” in the first place. Marx touches on this with his discussions on the nature of commodities, but he does not get to the root of the problem. To understand how the

world is reified we cannot just ask why a given physical commodity can have both a subjective and objective value to a subject because of social conditions. We need to understand how the world is broken into “things” in the first place. What is a “thing?” What constitutes it as such? What enables or compels us to see a tree instead of a forest, a river instead of an ecological system, or a human being instead of a being-in-the world? These are not abstract questions; if they appear so it is only because we have become so enraptured in a certain metaphysical way of thinking that it is difficult to even begin thinking or the “world” and “Being” more primordially. As Heidegger would trace out throughout his oeuvre, these metaphysical developments have had significant consequences.

Understanding the world as made up of individual objects is a metaphysical presumption that is so primordially built into our way of conceiving existence that even Marx is unable to detect it in his own work. It is also a foundational presumption for liberal-capitalist thought, because understanding the “world” as consisting of “things” is a pre-condition for regarding it as mere matter in motion which can be divided up to be used more efficiently for human ends. We forget that the very existence of anything is a great mystery, and should compel us to think about questions beyond who are and what it is we wish to achieve. In the last end, these too are only contingent questions. It is only once we begin questioning beyond these conjectures that we can fully break with the idea that the primary end of human life is our individual material satisfaction. The abstractions of liberal-capitalist thought are not only economic in nature; they are largely conjectural the whole way down. Contrarily, only when we stop thinking about “things” can we cease regarding our very human existence as just another object existing exclusively for itself.

Conclusion

This paper has been an involved examination of Marx’s methodological approach to political economy in general. I’ve tried to show how his dialectical materialist approach to issues such as the nature of production far supersedes its competitors in terms of its sophistication and profundity. Indeed, it is likely that Marx would find the contemporary logical positivist apologias for the economic status quo entirely vulgar.

At the same time I have also implied very briefly that Marx’s own world view rests on many of the same metaphysical presumptions as those of liberal-capitalists. It would be crude and simplistic to thereby characterize Marxist and liberal approaches as “metaphysically the same.” None the less there are no doubt important ontological questions which do not arise easily within the Marxist problematic. This is a key blind spot, since we must ask such questions if we are to indeed understand the world as a “totality” and not in its abstract parts. It might be tempting to shuffle aside the ontological question as unnecessary to formulating an incisive critique of political economy. But if we are to aspire to do more than that, if we truly wish to construct an alternative to the hegemonic liberal-capitalist order, we cannot let ourselves become mired in the same vulgar abstractions.

Bibliography


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