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Marxism

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Marxism is both a critical approach that wants to always question the mainstream policy-driven approaches to IR theory and a classical approach via the philosophical and sociological tradition of its namesake, the philosopher Karl Marx (1818–1883). In fact, Marxism is the only theoretical perspective in IR that is named after a person. Of the range of great thinkers available to us, Marx may not automatically qualify as being the most ‘internationalist’. In fact, most of Marx’s (and his sometimes co-author Friedrich Engels’) work was not primarily concerned with the formation of states or even the interactions between them. What connected their interests to IR was the industrial revolution, as this event was ultimately what Marx was witnessing and trying to understand. He, with Engels, developed a revolutionary approach and outlined a set of concepts that transcended national differences while also providing practical advice on how to build a transnational movement of people. Workers from factories across the world – the *proletariat* – were to organise themselves into a politically revolutionary movement to counter the exploitative and unequal effects of capitalism, which were accelerated and expanded by the industrial revolution. This vision of a potential link between the bulk of humanity as a global proletariat is where, and how, Marxism enters IR from a different vantage point to other theories.

The basics of Marxism

Marxist concepts are all connected by the common goal to contribute to what they perceive as the greater good of humankind and its environment. To borrow the words of Adrienne Rich (2002, 65), theory is

the seeing of patterns, showing the forest as well as the trees
– theory can be a dew that rises from the earth and collects in

the rain cloud and returns to earth over and over. But if it doesn't smell of the earth, it isn't good for the earth.

In other words, Marxists must remain informed and reflective of the basic and most common aspects of societies and their environment. This also means that if the industrial revolution (and capitalism in general) smells of burning coal, overcrowded factories and petrol fumes, the smells of the next revolution should be less deadly, less polluting and more protective of the earth. To understand Marxism, we need to grasp the basic elements of Marx's innovations regarding the origins and functioning of capitalism. In addition, we must understand that those origins and functioning can simultaneously happen at the domestic and international level. Combining these tasks leads to arguably the most important contribution Marxism offers to IR: that the capitalist mode of production and the modern sovereign states system (that emerged roughly at the same time) are not natural or inevitable events. They are interdependent products of particular historical conditions and social relations. The work of Marxists is to map and retrace those conditions and social relations and to figure out how the capitalist mode of production and the sovereign states system emerged – as two sides of the same coin, as different coins or maybe as different currencies. Debates on the degree of interdependence between these two major historical phenomena may be ongoing, but Marxism's achievement in IR has been to stop us from thinking about them separately. Marxism also advises that concepts are not just meant to help us understand the world – they should also help us change it.

To explain Marxism in IR, we need to start with Marx's main theory for the development of capitalism: historical materialism. Most simply, historical materialism asserts that human beings – including their relations with each other and their environment – are determined by the material conditions in which they can survive and reproduce. Therefore, Marxism asserts that material conditions can be changed by the actions of human beings as well as by events – think of climate change for example, which depends on physical phenomena as well as human behaviour. In other words, these material conditions are historical, they change over space and time. But they are also always dependent on – and often hampered by – the processes and ideas that preceded them, as the past weighs on the present. A Marxist would stress that IR is not just about states' foreign policy or the behaviour of politicians, but more about survival (or more broadly, life), reproduction, technologies and labour. If this is correct then the separation between the political and economic, or public and private, is problematic because those categories hide the ways in which states and foreign policies are determined by the social relations and structures of the global economy – such as multinational corporations or international financial institutions. Put differently, Marxism fundamentally questions what 'the international' is in IR. Whether it

is anarchy for realists or international society for the English school, Marxists argue that such concepts are problematic because they make us believe in illusions or myths about the world. For example, the concept of anarchy creates the mirage that states are autonomous agents whose rational behaviour can be predicted. However, this ignores the endurance of regional inequalities and the structural and historical links between states, violence and the key actors of the global political economy.

The first application of Marxist ideas to explain international processes was by communists and revolutionaries of the early twentieth century such as Rosa Luxemburg, Rudolf Hilferding and Vladimir Lenin. These authors developed what we now call the classical theories of imperialism to understand how capitalism expanded and adapted to a world of inter-imperial rivalry leading to the First World War and the slow disintegration of the European empires.

In 1974, Immanuel Wallerstein developed 'world systems theory' to incorporate the changes of the late twentieth century and counter the way traditional approaches tended to understand imperialism as a state-led process. Wallerstein's approach used different units of analysis and took a much longer-term view of the history of states and their interactions. He distinguished three groups of states or regions: the core, the semi-periphery and the periphery. The aim was to understand how states have developed since the sixteenth century in relation to each other, thereby creating relations of dependency between different groups of states depending on the specific types of economies and industries they specialised in. Therefore, these relations of dependency and groups required that we understand the world through broader units than states. These units – or world systems – helped to address the dilemma of why states all became capitalist, albeit in very unequal and different ways. The core group of states (e.g. in Western Europe and North America) refers to democratic governments providing high wages and encouraging high levels of investment and welfare services. The semi-periphery states (e.g. in Latin America) are authoritarian governments that provide low wages and poor welfare services for their citizens. Periphery states (e.g. sub-Saharan and Central Africa, South Asia) refer to non-democratic governments where workers can mostly expect wages below subsistence levels and where there are no welfare services.

The core is able to produce high-profit consumption goods for itself as well as for the semi-periphery and periphery markets because the periphery provides the cheap labour and raw materials to the core and semi-periphery necessary to make these high-profit consumption goods. In other words, although historically some states have changed their group (e.g. from periphery to

semi-periphery), capitalism always needs a peripheral region that provides the means for the core to sustain a high level of consumption and security. Thus, relations of dependency and inequality are essential to capitalism and cannot be significantly reduced.

Another influential update of the classical theories of imperialism is the neo-Gramscian strand of Marxism. Antonio Gramsci's (1891–1937) concept of hegemony is thought by some to be more useful today than the concept of imperialism. It emphasises two things. First, the domination of some groups of individuals (or groups of states) over other groups also depends on ideological factors. In other words, capitalism is experienced in different ways historically and across the globe because people understand it – and therefore agree to or resist it – in different ways. Second, the relations of dependency and types of groups (or units) used to understand those relations are more varied and fluid than world systems theory. Therefore, capitalism dominates our social relations because it is reproduced through coercive *and* consensual means. The concept was used to explain why educated and organised workers in Western Europe did not 'unite' to 'lose their chains', as Marx and Engels had predicted. A neo-Gramscian concept of hegemony focuses on the consensual ways in which transnational classes, organisations and international law reproduce capitalism and its inequalities. The transnational capitalist class – dominated by great powers – forms a 'global civil society' that universalises liberal ideals rather than imposing itself through more coercive processes of classical imperialism and colonisation, as was the case in earlier times.

For example, Singapore, Hong-Kong, South Korea and Taiwan were known as the Four Asian Tigers because of their rapid industrialisation and high growth rates from the 1960s to the 1990s. In these countries, a strong ruling elite consented to a specific type of financial economy – often called a 'neoliberal' model – which also took hold across the world to varying degrees as other states sought to emulate this 'success'. However, vast inequalities and human rights violations are increasing across and within many societies despite the dominance of neoliberalism globally. This shows that although neoliberal hegemony is far from producing the success it originally projected, this *perceived* success remains one of the main drivers of capitalism because it convinces people to consent to capitalism without the threat of force.

A more recent trend of Marxism in IR – historical sociology – returns to some of the more classical problems of IR. Specifically, it looks at the development of the modern state system in relation to the transition(s) to capitalism and to the different moments of colonial and imperial expansion. It looks more closely at what happened inside Europe but also beyond Europe. More

specifically, it contests the birth of the sovereign states system following the treaties of Westphalia in 1648 and instead focuses on more socio-economic processes in the nineteenth century to define key shifts in modern international relations. This underlines how scholars are taking history beyond Europe in order to address the Eurocentric assumptions found in Marxism and in the wider discipline of IR itself.

In sum, Marxism is characterised by interdependence. The Marxist term for this is *dialectics*, which underpins the way in which all the previous concepts explored in this chapter relate to each other. For Marxism, all concepts reflect social relations, but categories take on a life of their own and often hide those social relations. It is easy to overcomplicate or abuse this concept. However, it is a crucial starting point for understanding the world as a whole, rather than just its individual parts, since 'dialectics is a way of thinking that brings into focus the full range of changes and interactions that occur in the world' (Ollman 2003, 12).

Marxism, migrants and borders

A Marxist IR approach to migration shows the importance of historical materialism as an approach to IR. First, Marxists are critical of the fixed aspect of borders because they create relations of dependency and inequality between peoples by restricting and controlling their access to resources and labour. Some Marxists argue that we need a global concept of citizenship to counter how states exclude non-citizens from benefits and access to labour and resources. After all, from a Marxist point of view, peoples of all nations are united in their oppression by capitalism and the modern state system that separates them and sets them against each other, so people should be freed (or emancipated) from this status. Consequently, Marxists see borders as fixtures that unfairly determine relations of dependency and inequality – or in other words, who has the right to what. Second, we need to think of who decides who is a migrant and what that category entails. For example, being a migrant who is fleeing a country because of persecution is a necessary condition according to international law for applying for asylum and becoming a refugee in a host state. Most states have signed the 1951 Refugee Convention and have agreed to this definition. Hence, the reality of being this particular type of migrant is dependent on a specific treaty and the will of states to consent to it. In other words, the category of persecuted migrant or refugee is relative – it is not real in the sense that the colour of your eyes is real and cannot be decided differently by someone else.

People who flee from poverty related to conflict, climate change, or lack of jobs are often designated as economic migrants. Their status does not

depend on a definition as clear as that of a refugee, and it also does not lead to the same rights and opportunities. Many people move towards Europe because it offers more economic opportunities and a relatively safer political environment. However, decisions at the European and state level are increasingly resulting in the strengthening (or closing) of borders, because some feel that economic migration is not a sufficient reason to freely admit a person. In contrast, being an economic migrant who has a particular skill needed by the host country *is* considered legitimate. In other words, the 'reality' of being a 'good' economic migrant – who is allowed to move across countries – depends on factors that are often independent of the person migrating.

Marxism provides us with an original angle that makes us reconsider migration and shows why closing borders is a sociologically and politically blind policy in relation to the system we all live in. In effect, capitalism started a simultaneous process of territorial bordering and of social change through wage-labour. Mainstream IR separates those processes historically and theoretically by taking the separation between the domestic and international as fixed and real. Marxism argues that this leads to obscuring the social relations and processes linking movements of people and the creation of borders. In other words, dissociating the domestic and international levels leads to thinking that being a migrant is the reserve of certain people rather than a condition we are all subjected to. Crucially, it justifies treating migrants as second-class people and therefore leads to further racial and social inequalities.

Movement of peoples occurred long before capitalism, but capitalism shapes those movements in conjunction with the creation of borders and economic productivity. The process of enclosure at the beginning of capitalism led to people moving away from the land on which they hunted, gathered and grew food. The process involved landowners closing off or fencing common land so as to graze sheep and develop more intensive methods of agriculture. This gradually transformed social relations – the ways in which people could survive and reproduce. Without land to survive on, people had to start selling their ability to work – what Marxists call labour power – and often had to work far from their homes. Although people move for a variety of reasons, one that is particularly familiar is the necessity to move to sell our labour. This can involve transferring from the countryside to an urban centre within a state or from one state to another. In other words, it is the same imperative to work that makes this move happen, whether one crosses an international border or not. In a capitalist system, it is hard to survive without working and working implies moving or being prepared to move. In other words, we are all in theory migrants. Acknowledging this means that closing borders, which involves fixing peoples' status as 'good' or 'bad' economic migrants, is based

on two illusions revealed by Marxism and should therefore be questioned and reconsidered. The first is the distinction between domestic and international. Capitalism is an expanding international system and allows domestic borders only in so far as it can transcend them economically. The second illusion is the distinction between categories of people as real and fixed. Capitalism allows the elite to transcend borders economically but also allows the potential to close them politically. Thus, it allows certain people (the most wealthy) to decide that others (the least wealthy) cannot try and change their situations.

Conclusion

The role of theories and knowledge more generally is to reveal what is real and what is an illusion. Historical materialism – the theory that drives Marxism – tries to apply this advice by grounding the understanding of international relations in the ways in which people have transformed the land, produced things on it and are ultimately dependent on its resources for shaping political institutions such as the state and international organisations. Marxism has made several inroads in the development of the discipline of IR by being intrinsically concerned with the ways in which people – and groups – interact and produce things across borders, as well as how they organise themselves through institutions to manage and contest the production and distribution of things across the world. More specifically, it argues that the construction of modern borders is determined by, or linked in various ways to, the development of capitalism. Therefore, it makes us question the natural or inevitable character we tend to ascribe to our economic and political systems. In other words, if a system is not as real and fixed as we first thought, because it has a particular and relatively short history in the broader course of humanity, then it becomes much easier for us to imagine the various ways it is challenged and how it could be transformed to a system that, Marxists hope, will better redistribute the wealth of the world. Marx himself wrote that philosophy is often too concerned with interpreting the world, when the real point is to change it. Marxism as a theory of IR has certainly answered that call and, regardless of variations within the theory family, to be a Marxist always means to challenge one's ideas about the world.