

Analysis of the Development Trajectory of Marx's Historical Philosophy

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Abstract: In his early years, Marx, inspired by Hegel, believed that history is a process of dynamic evolution. Therefore, he also paid attention to the replacement of social forms and the differences in social forms among different ethnic groups. While Hegel believed that the driving force of historical progress lies in “spirit,” Marx focused more on the role of “material” in it. Thus, in his theories of social forms and world history, Marx emphasized the historical progress brought about by changes in the mode of production. Based on this, Marx expounded his views on the evolution of social forms and the development status and prospects of world history. He consistently held a “equality” political inclination and continued to pay attention to the oppression suffered by backward nations. This paper summarizes Marx’s social form theory, world history theory, and his related discussions on backward nations in his historical philosophy. It outlines the global perspective from the internal social evolution of nations to the coordinated development of the world, and then to Marx’s humanitarian care for backward nations.

Keywords: Marx’s historical philosophy, social forms, world history, backward nations

1. Introduction

The question of how to interpret history has been a subject of diverse philosophical inquiries, encompassing debates on whether history is objective or subjective, whether it is subject to change, where the driving force of historical change originates, and what forms historical change takes. Marx inherited Hegel’s notion that history is objective and subject to change. While there is little disagreement regarding Hegel’s division of historical stages based on social forms, Marx differed in the criteria for such divisions, asserting from a materialistic standpoint that the driving force behind the evolution of social forms lies in the productive forces and relations of production. Building upon this foundation, Marx formulated his own historical philosophy, redefining different historical periods based on modes of production. Concurrently, Marx observed that the evolution of social forms in the capitalist era is no longer confined within the boundaries of individual nations or states. Instead, with the expansion of capitalism, different nations evolve collectively within the global context. Marx posited that human history would transition from the histories of different nations to world history. Within the backdrop of world history, the relationship between advanced and backward countries necessitates scrutiny, as Marx noted the oppressed status of backward nations within the international order, expressing concern over this issue. Thus, the theories of social forms, world history, and the

attention given to backward nations constitute the three components of Marx's historical philosophy.

2. Marx's Theory of Social Forms

Marx divided social forms into different periods throughout his lifetime. In "The German Ideology," Marx analyzed the forms of ownership in European history, delineating tribal ownership, ancient communal ownership, state ownership, and feudal or hierarchical ownership. In the early 1850s, Marx turned his attention to the "Asiatic mode of production," considering it as a distinct form of Asian society. In the "Preface to A Contribution to the Critique of Political Economy" published in 1859, Marx pointed out from the perspective of productive forces and relations of production: "Broadly speaking, the Asiatic, ancient, feudal, and modern bourgeois modes of production can be viewed as several stages in the economic formation of society." [1] At this time, Marx regarded the Asiatic mode of production as a form universally experienced by humanity. However, after studying ancient anthropological works, he concluded in 1881 that the Asiatic mode of production represented the final stage of primitive commune. In 1884, Engels recognized in "The Origin of the Family, Private Property, and the State" that the clan commune was the initial form of human society. Apart from delineating social forms from a socio-economic perspective, Marx also categorized them based on the degree of human emancipation into relationships of human dependence, material dependence, and the full development of human freedom in the "Economic Manuscripts of 1857–1858." In the "Critique of the Gotha Program," Marx divided communist society into first-stage and advanced-stage based on whether it "transcends the narrow confines of bourgeois rights."

Marx studied the relationship in the evolution of social forms. Concerning the driving force behind the evolution of social forms, Marx continuously refined his theory of explaining social forms through productive forces and relations of production in his works, arguing that the development of productive forces is the driving force behind the evolution of social forms. In his later years, Engels developed a new understanding of the driving force behind the evolution of social forms, emphasizing the significant role of human production in the development of prehistoric societies and highlighting the profound impact of non-production factors on humanity's transition from the primitive commune stage. Regarding the sequence of evolution of social forms, many scholars have summarized various theories based on Marx's discourse, including the "Five-Form Theory," "Three-Form Theory," and "Two-Form Theory." These theories mainly illustrate the stages of the evolution of social forms from different perspectives, representing different aspects of the same process. Among them, the "Five-Form Theory" has had the most profound influence, primarily based on Marx's view in the "Preface to A Contribution to the Critique of Political Economy" that the Asiatic, ancient, feudal, and modern bourgeois modes of production represent several stages in the evolution of social forms, along with the future communist society, forming a linear path of five stages of social form evolution. However, such a path of the evolution of social forms is confined to the historical experience of Western Europe, and its universality has not been tested in other societal regions. Whether it is the mode of production in Asia, the slavery system in ancient Greece and Rome, or the feudal system in Germanic societies, they all originated from the primitive commune. When the Germanic primitive commune conquered Rome, it merged with the Roman social structure to form feudalism. The sequential order in time does not necessarily imply the universality of the transition between the slave system and feudalism. Marx pointed out in the "A Contribution to the Critique of Political Economy (Manuscripts of 1857–1858)" that the Asiatic mode of production, ancient Greek slavery, and Germanic feudalism all retained the form of the commune, with differences lying in the proportion between commune and private ownership, determined by the circumstances of the tribe's transition from the primitive commune to secondary forms, as well as changes triggered by geographical and climatic conditions, and relations with other tribes or civilizations.

According to Marx's theory of social forms, the primitive commune is a social form that all nations

must pass through. Different tribes, emerging from the primitive state, exhibit diversity due to various internal and external factors. “Secondary forms include a series of societies based on slavery and serfdom” [2]. Marx listed three social forms: ancient Greek slavery, Germanic feudalism in Europe, and the Asiatic mode of production in Asia. The Asiatic mode of production is a special stage that marks the transition from the primitive to the secondary form, characterized by the shift from communal ownership to private ownership [2]. Due to Marx’s cultural background, his analysis of ancient Greek slavery and Germanic feudalism is specific to particular ethnicities. However, the Asiatic mode of production encompasses a wide range, and Marx could only provide a general overview based on available materials. In reality, Eastern societies not only exhibit differences in social forms among different ethnic groups but also vary within ethnic groups over time. Consequently, the evolution of specific social forms for each nation or region after the primitive commune follows a chronological order rooted in internal ethnic laws, but it does not possess absolute universality. However, Marx initially believed that entering modern society had only one path, capitalism, viewing the transition of various nations into capitalism as an “iron necessity.”

Regarding the relationship between “modern society” and “capitalist society,” Marx, in his early works, largely equated modern society with capitalist society. “Modern” here does not imply a temporal sense but rather a conceptual one concerning the development of productive forces and relations of production, with communism corresponding to the “future.” In the “Preface to the Critique of Hegel’s Philosophy of Law,” Marx referred to England and France as “modern states,” while Germany was labeled as an “unfinished modern state.” Throughout Marx’s numerous works, such as “The Administrative Reform Association—The People’s Charter,” “Letter to P. V. Annenkov,” “The Communist Manifesto,” and “Capital,” he frequently employed concepts like “modern society,” “modern division of labor,” “modern industry,” and “modern mode of production,” treating “modern” as synonymous with “capitalist.” Engels, in “Principles of Communism,” also used “modern society” to refer to “capitalist society.” In the “Critique of the Gotha Program,” Marx explicitly stated, “‘Modern society’ is the capitalist society existing in all civilized countries,” [2] though the specific “modern state systems” vary. During Marx’s era, “modern society” predominantly referred to Western European capitalist societies. Marx believed that “the more advanced countries show the less advanced the image of their own future,” [3] implying that only Western European capitalist society represented the form of “modern society.” Given that the potential space for the form of “modern society” had not been fully explored during Marx’s time, it was reasonable to equate “modern society” with “capitalist society.”

“Modern society” emerged intrinsically in the feudal system of Western Europe as a capitalist social form, radiating outward with Western Europe at its core. According to Marx’s conception in “The Communist Manifesto,” under the invasion of Western European capitalism, other ethnicities would also enter modern society in the capitalist form. “It compels all nations, on pain of extinction, to adopt the bourgeois mode of production” [1]. Thus, the issue of “modernization” becomes a matter of “capitalization,” entering “modern society” is tantamount to entering “capitalist society,” and achieving modernization must be through the development of capitalism. In his later years, Marx attempted to break through this conception, which has been proven correct in the course of development. If we understand “modern society” as a commodity society that has achieved political liberation on the basis of industrial civilization, then the fact proves that modernization does not equal capitalism, let alone Westernization. As human society moves away from the primitive forms into the diversified “ancient” secondary forms, how will the diversification be represented as human society moves away from the “ancient” and into the “modern”? According to the mode of material production, Marx in the “A Contribution to the Critique of Political Economy (Manuscripts of 1857–1858)” believed that the difference between ancient Greek slavery, Germanic feudalism, and the Asiatic mode of production lies in the proportion of “public” and “private” ownership in society. Therefore,

considering the mode of material production, whether “modern society,” until it returns to the fully public ownership of the “future” communist society, can also be classified based on the proportion of “public” and “private” ownership of the means of production is open to debate.

3. Marx's Theory of World History

Marx inherited and critiqued Hegel's theory of world history. Hegel in “Philosophy of History” suggested: “World history moves from the ‘Orient’ to the ‘Occident,’ where Europe represents the absolute endpoint of history, and Asia, the starting point.” [4] “World history” in the temperate zone of the northern hemisphere moves from the “Orient” to the “Occident” and gradually progresses “towards freedom,” as “world history” is about “making the unbridled natural will subject to universal principles, achieving subjective freedom.” [4] According to Hegel, as the “universal spirit” moves from the “Orient” to the “Occident,” it leaves different imprints in various regions along the way. The “despotic regimes” of the East, the “democratic and aristocratic regimes” of ancient Greece and Rome, and the “monarchical regimes” of the Germanic world correspond respectively to the childhood, youth, and old age of “world history.” Additionally, Hegel believed that “world history” would begin its future in North America. Hegel used geographical environments and different stages of the movement of the “universal spirit” to explain the differences in the development of various nations. In Hegel's view, the unfolding of “world history” is mediated by spatial-temporal relations. Marx agreed that world history is a collection of nations at different stages of development and different social forms, but he opposed explaining differences between nations using the movement of the spirit and using spiritual development to explain social development. In the “Economic and Philosophic Manuscripts of 1844,” Marx mentioned: “The so-called world history is nothing but the process of man's birth through man's labor” [2], emphasizing “history” rather than “world.” In “The German Ideology,” Marx truly introduced “world history,” believing that “world history” is the result of the development of productive forces that increasingly connect various parts of the world, establishing “the world-historical existence of individuals, that is, the existence of individuals directly linked to world history.” [5] At the same time, Marx stated that communism must be established on the significance of “world history,” as “every nation depends on the transformation of other nations” [5]. Marx's “world history” refers to the formation of an increasingly unified global community, as the modernizing force of Western European capitalism expands outward, establishing a common historical stage for every region and every individual worldwide.

The Globalization and Modernization Nature of “World History”. Marx pointed out that during the bourgeois historical period, the inception of “world history” bore the dual mission of fostering “universal exchange based on mutual trust among all humanity” and “developing human productivity.” “World history” exhibits a globalization nature as the global trade and division of labor, spearheaded by Western Europe, integrate every part of the world, rendering every individual not isolated but engaged in universal exchanges. With the advancement of maritime and overland trade, the establishment of ports in coastal areas, and the interconnectedness facilitated by railways, every piece of land is intricately linked, breaking the previous isolation of various ethnic groups. Raw materials and products from each region are not only supplied locally but also exported overseas. Moreover, “world history” possesses a modernization aspect, where the outward expansion of modern civilization from Western Europe disseminates advanced productivity worldwide. The extent of “world history” formation correlates with the degree of modern civilization dissemination. On one hand, the bourgeoisie, aiming to acquire raw materials from underdeveloped regions and expand their sales, constructs infrastructure and factories in these areas, thus promoting a certain level of modernization. On the other hand, modern ideas are introduced to various regions, instilling a consciousness of modernization among the populace. Given that “the establishment of new industries has become a vital issue for all civilized nations” [1], under the dual demands of internal and external

factors, regions and ethnic groups worldwide are undertaking their respective explorations of modernization. Only through the enhancement of productivity in each region can “universal exchanges among people be established,” breaking the old pattern of ethnic division of labor, and fostering closer ties between each region’s modernization and the rest of the world, thereby making history more truly “world history.”

The Capital Logic and National Logic of “World History”. The unfolding of “world history” is propelled by the modernization of capitalism civilization, where the logic of capital is the generated logic, and the driving force behind the formation of world history comes from the pursuit of profit by capital. The bourgeoisie’s promotion of the formation of “world history,” uniting all humanity into a unified whole and dragging them into the process of modernization, is not motivated by “good intentions” but merely serves as “the unconscious tool of history.” The logic of capital dictates that the resulting “world history” is inevitably a scene of exploitation; the more universal interaction forms, the more individuals are placed under the logic of capital, leading to direct and thorough exploitation of each individual. Meanwhile, the bourgeoisie expands outward using the nation-state as a tool. Capital and the state apparatus are deeply intertwined, and the “modern state power is nothing but the managing committee of the entire bourgeoisie” [1]. This determines that the modernization level of each nation is not merely a matter of the chronological order of exposure to modern civilization; the bourgeoisie of each nation will prioritize the development of their own nation, and the global division of labor among nations will be determined by the bourgeoisie of advanced nations. Consequently, the formation of “world history” not only gives rise to the phenomenon of “propertyless” masses in all nations, with the proletariat becoming the majority opposing the bourgeois world but also utilizes the oppression of backward nations by advanced nations as its shell, “subordinating the peasant nations to the bourgeois nations, and the East to the West” [1], creating a nested hierarchy of exploitation relationships between individuals under the guise of national hierarchy, thus gradually awakening “national consciousness” even among backward nations. The formation of “world history” gives rise to contradictions between the global proletariat and bourgeoisie and between advanced and oppressed nations. The capital logic of “world history” is wrapped in national logic, making “national liberation” an essential aspect of “human liberation.”

Marx and Engels believed that the realization of communism is premised on “world history,” which is based on “the universal development of productive forces and the associated global interaction” [5]. They also believed that only when the dominant nations revolutionize successfully simultaneously can communism be realized, thereby controlling “world history,” at which point “world history” is in its complete form. Although bourgeois nation-states are “false communities,” and on an ideal level, “the proletariat has no country,” the logic of capitalist expansion does create factual national inequalities. Meanwhile, “nationalism” serves as a tool for uniting the proletariats of each nation and is widely promoted in education. “Once the theory is grasped by the masses, it becomes a material force,” and proletariats of each nation come to identify with having their own homeland as a reality. The oppressed nature of the proletariat in advanced nations under the logic of capital is obscured by the domination of foreign nations under national logic, and the proletariat has not yet become the majority in backward nations. Therefore, the driving force for the realization of communism seems to be found among the victims under the national logic of “world history.” The communist movement fights through backward nations in the form of nationalism, and it can be foreseen that the independent movements of backward nations will use socialism to oppose the dominance of Western capitalism.

4. Marx’s Attention to Backward Nations

Marxism, known as the “science of human liberation,” has naturally focused on the interests of the oppressed since its inception. Against the backdrop of capitalism, Marxism pays special attention to

the proletariat, who are both oppressed and carriers of revolutionary movements. However, Marx did not overlook the suffering endured by non-Western nations that had not yet undergone modernization. In the 1850s and 1860s, due to a series of imperialist aggression and oppression events, Marx paid considerable attention to China and India, penning works such as “The Chinese Revolution and the European Revolution,” “Russian Trade with China,” “The Atrocities of the English in China,” “Persia and China,” “The History of the Opium Trade,” and “The British Rule in India.” In these works, Marx not only condemned the oppressive behavior of countries like Britain and Russia but also theoretically analyzed the impact of such actions. In “The Chinese Revolution and the European Revolution,” Marx proposed the idea of “the interconnection of the two extremes,” suggesting that the impact of the Taiping Rebellion in backward China could lead to a revolution in developed England. Marx linked the fate of developed nations with the uprisings of backward nations, laying the foundation for exploring the development paths of backward nations and the effects on developed nations in the context of their interaction. At this time, Marx believed that the uprising in ancient China, under the onslaught of British capitalists, would lead to the establishment of a “Chinese Republic - freedom, equality, and fraternity,” akin to a bourgeois republic. He also suggested that “Chinese socialism vis-à-vis European socialism might be akin to Chinese philosophy compared to Hegelian philosophy” [6]. In summary, Marx’s attention to backward nations during this period focused more on their receptivity to external forces rather than their agency, primarily discussing their vulnerability to the impacts of capitalism.

Marx paid considerable attention to anthropology in his later years, aiming to explore early human social forms and further refine the materialist conception of history. In the 1870s and 1880s, he read numerous anthropological works and made extensive summaries. The works Marx studied were based on primitive tribes that still existed at the time, including Kovalevsky’s “The Communal Land Ownership and its Disintegration,” Morgan’s “Ancient Society,” and Lubbock’s “The Origin of Civilization and the Primitive Condition of Man.” Marx and Engels devoted a great deal of effort to Morgan’s “Ancient Society.” Engels remarked, “In America, Morgan has discovered in his own way what Marx discovered 40 years ago—dialectical materialism in history” [7]. Engels utilized Marx’s summaries of “Ancient Society” to write “The Origin of the Family, Private Property, and the State,” which deeply analyzed the social forms of primitive tribes. In his “Historical Notes,” Marx further elucidated the social development process of pre-capitalist Europe. These studies laid the groundwork for exploring the social development paths of backward nations.

In Marx’s era, and even today, many tribes still remain in a primitive social state without developing into more advanced social forms, indicating that social development is not necessarily inevitable, or that there is a universal timeframe for the transition of social forms. Marx pointed out, “No social order ever disappears before all the productive forces for which there is room in it have been developed; and new higher relations of production never appear before the material conditions of their existence have matured in the womb of the old society” [1]. Due to various reasons such as nature, internal conditions, and relations with other tribes, some tribes with long-standing stagnant development of productive forces remain in a primitive society. The “maturing in the womb of the old society” that Marx mentioned refers to endogenous evolution of social forms, but this condition may not necessarily apply to exogenous evolution of social forms after entering “world history.” The phenomenon of “direct passage nations” from primitive tribes to modern society is universally observed. Therefore, this “maturing” of material conditions can be externally transplanted into the embryo of the old society, rather than necessarily being endogenously matured. However, the “world history” that unites humanity as a whole may become a new vast “embryo of the old society.”

5. Conclusion

In summary, Marx’s philosophy of history still offers vast research space today. The evolution of

social forms brought about by technology, the increasing closeness of global interactions leading to both conflict and cooperation, and the survival and development issues of backward nations under the current order, are all significant topics worth attention. Marx provides perspectives on examining social development from both technological and social relationship angles. He believes that social development, the fusion of the world, and the prospect of backward nations breaking free from oppression are inevitable. At the same time, he believes that progress in any society depends on technological innovation and reshaping of social structures, providing valuable theoretical references for the development and international cooperation of countries today.

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