

# Revolutionary Marxism 2025

"Lights have come on at Karabet's grocer/This Armenian citizen did not forgive/The slaying of his father on Kurdish mountains/But he loves you, for neither have you forgiven/Those who have stained the Turk's brow with that blood"

Nâzım Hikmet

"Is the Imperial Chancellor aware that in the present war in the land of our ally, the Turkish empire, hundreds of thousands of Armenians have been exiled and massacred?"

Karl Liebknecht, MP, posing a question in the German Reichstag, January 1916



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A JOURNAL OF THEORY AND POLITICS



**RM Editorial Board**  
**Sungur Savran**  
**Alp Yücel Kaya**  
**Ana Bazac**  
**Savas Mikhail-Matsas**  
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**Levent Dölek**  
**Kutlu Dâne**  
**George Habash**  
**Korkut Boratav**  
**Michael Roberts**  
**Sergio Crescenzi**  
**S. Savran- E. A. Tonak**

**In this issue**  
Armenian genocide  
Political Marxism: A refutation  
Kant's at his tercentenary  
Defeating the armageddon  
Twentieth Congress of the CCP  
Turkish elections  
Zionist genocide and resistance  
Revolution and workers  
Marx for 21st-century capitalism  
Tracking Marx's *Capital*  
In the footsteps of *Capital*  
Interview with Paul M. Sweezy

*Without revolutionary theory  
there can be no revolutionary movement.*  
V. I. Lenin, *What is to be done?*

# **Revolutionary Marxism 2025**

## Special annual English edition

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### ***Cover Photo***

A photograph of women and children during the Armenian genocide in 1915  
(courtesy of Sait Çetinoğlu)

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## In this issue

This edition of *Revolutionary Marxism* has been delayed by a host of factors, but the last phase of the preparation was directly hampered by the reactionary attack, entirely outside legal boundaries and trampling all democratic precepts, by Erdogan's despotic government against his major rival, the CHP-affiliated Istanbul mayor, for the next presidential election (still some way off) in order to bar him from running. We are confident that our readers are aware of the details of this episode. We would only like to emphasise the fact that this led to a revival of street politics, in the course of which especially university students, later joined by their high school kindred, became very active despite the repression of the regime's police forces. It was as a result of his support for this student movement, slowly but surely moving outside the hegemony of the CHP, during a march organised by the Union of Education and Science (Eğitim-Sen) that our comrade Levent Dölek, Deputy Chairman of DIP, the Revolutionary Workers Party, was first detained by the police in a dawn raid to his home and then arrested pending trial by a court. He remained in prison for a fortnight, bravely and astutely spread the word of his party, and was finally released along with some of his students. (You can read his assessment of the overall political situation of the country in the light of the local elections of 2024 in this edition of the journal.) This is why our editorial piece "In This Issue" is somewhat dated. We decided that rather than extending even further the delay in the publication of the journal we would leave the editorial piece as it was.

*Revolutionary Marxism's* 2025 issue appears at a juncture where a reshuffling of global politics is afoot on several planes. The new and bolstered Donald Trump administration in the US comes with a new tactical orientation for the foremost imperialist power. Negotiations with Russia already started in Riyadh, Saudi Arabia, to conclude the NATO-Russia war fought on Ukrainian soil. The fact that the US intends to sit on the other side of the table with Russia – and not Ukraine – betrays the real belligerents of the war, notwithstanding the spurious refrains about Ukraine's war of independence. A war of aggression against Russia conducted by Western imperialism fittingly reaches a new phase with the reorientation of the former.

The new set of tactics of US imperialism also has been causing a whole lot of inter-imperial tension. In addition to sidelining the EU in the Ukrainian question –in vain, they waited for an invitation to Riyadh – the US has been raising claims on Greenland, an autonomous region of Denmark and hence part of the EU, possibly to leverage it to haggle with the EU and secure more concessions, on security and commerce alike. The threat of tariffs that Trump has been waving around targets not only China and Mexico but also Canada (even if the initial 25 percent tariffs are postponed for now) and the EU, causing further problems. While it is too early to reach a verdict, the inter-imperial fissures, particularly that between the US and the EU, might prove to be a crucial dynamic in the years to come.

The reorientation of US imperialism hardly resembles that of ardent peace lovers. On the contrary, it is clear that US imperialism seeks to recalibrate its forces according to a new tactic but with the same old strategy. Negotiations with Russia go hand in hand with further support towards Israel in its genocidal war – shifted towards the West Bank after the so-called ceasefire – and Trump’s despicable calls for the total ethnic cleansing of Gaza. The ceasefire, already on shaky ground with constant Zionist provocations, might soon come to an end, and Zionist colonialism might launch the second and even more brutal phase of its genocide.

Palestinian resistance and resilience remain steadfast, but the broader conjuncture has worked against the forces known as the Axis of Resistance in the last year or so. Hassan Nasrallah’s murder in a targeted Zionist bombardment was the peak point of what might be a 1967 moment for the Axis of Resistance, comparable to that of Nasserism in the six-day war – meaning an utterly devastating military defeat at the hands of the Zionists and the beginning of the Axis’ decline as the hitherto hegemonic force in Middle Eastern politics. Further developments only corroborated this analysis. Hezbollah had to swallow a ceasefire agreement with Israel that was highly disadvantageous for the Lebanese side – and this is putting it mildly. The new Lebanese president, Joseph Aoun and the new government under Nawaf Salam hardly seem propitious to Hezbollah. The fact that Hezbollah and its ally Amal, in contrast to the past when they were able to control all the ministries allotted to the Shiites, could this time only obtain four out of five Shiite ministers – meaning that the government would not fall even if their ministers were to resign, given that the remaining Shiite minister would let the government preserve its so-called “sectarian legitimacy” –is a further symptom of Hezbollah’s diminishing clout. The fall of Bashar Asad’s power in Syria only bolsters this trend.

The civil war in Syria, which emerged out of what was briefly an episode with the Arab revolutions but rapidly turned to a reactionary conflict, came to a tentative conclusion with the victory of the takfiri forces coalesced around the HTS. While the forces led by Assad surrendered to the takfiri army, forces such as Russia, Iran and Hezbollah, which were in conflict with imperialism, suffered a serious blow. With the victory of the takfiris in Syria, Hezbollah’s supply lines in Syria have been cut. It is clear that Israel has been greatly relieved. Moreover, fighting Israel while the genocide against the Palestinian people continues is not on the agenda of HTS and other takfiri organizations.

This does not mean that the imperialists and Zionists have won a decisive and final

victory in the region. The “victory” was won by forces that are still on the list of “terrorist organizations” in the imperialist countries and their rivals fed and equipped by Turkey. The fate of the Kurdish groups, which have unfortunately turned to a strategic alliance with the US, or that of the remnants of Assad’s forces is uncertain, and Turkey has gained an edge in the region. More importantly, the reason why the imperialists have been able to achieve such victories, is, first of all, that their opponents are not workers’ states, but states that are fighting against imperialism with serious weaknesses. Russia and Iran, on the one hand, repress their own societies and pursue policies in the interests of a handful of oligarchs and mullahs, while on the other hand, instead of showing real solidarity between themselves, they still pursue their own subtle and “realistic” foreign policies against imperialism, the enemy of humanity.

For the Kurds, the situation in Syria does not present a rosy picture. There is a possibility that US imperialism will let the Kurds down and give space to NATO member Turkey. In the meantime, Arab tribes benefitting from the new balance in Syria are launching attacks against the YPG east of the Euphrates. Well aware of its conundrum, the SDF has recently hinted at its openness to accept the main terms of the new power in Damascus, and integrate its forces into the Syrian army.

The reflection of this situation in Rojava in Turkey was the introduction of a “new opening” by the fascist Nationalist Action Party (MHP), the main – if uneasy - ally of Erdoğan. It would be naive to think that this is independent of the developments in Syria. What is happening is not the AKP’s return to its “democratic days”, much vaunted by imperialist public opinion in its early years, but the colonialist plans of the Turkish bourgeoisie taking a new form and the search for it. If Abdullah Öcalan, the imprisoned leader of the PKK, convinces the YPG to fight for the same Sunni cause under the command structure of the Syrian army and join the Turkish armed forces when required by prospective alliances, this will increase the strength of the Sunni Arab, Turkmen and Kurdish (KDP) alliance that appears to be on Turkey’s side in the region. The PKK will be liquidated, and the remaining forces will try to get incorporated into this alliance.

As per above, 2024 will pass into history as the year of the first genocide of the twenty-first century. The insolent killing spree that Zionist Israel engaged in against the civilian population of Gaza, targeting the elderly, unarmed women and men, children and babies indiscriminately, can go by no other name than genocide. Despite the respite provided by the fragile cease-fire of recent weeks, this brutal practice will, in all probability, continue into 2025 and perhaps beyond.

2025 also happens to be the 110th anniversary of an early twentieth-century genocide. In that fateful year of 1915, in the midst of World War One, the Armenians of Anatolia (or Asia Minor) were massacred in their hundreds of thousands, the highest estimates even surpassing the million-mark. The instigator of the crime was the political leadership of the fledgling Turkish wing of the bourgeoisie of the country that was still then the Ottoman Empire. Turk and Kurd united in killing and raping and forcefully converting a people that had long been declared to be the “loyal nation” for centuries by tradition.

This question was anathema in public discourse up until the late twentieth century, but has been the topic of acrimonious controversy within Turkish society since the

mid-1990s. The moral driving force operational in bringing the topic on the agenda was the Armenian community of Istanbul, with Hrant Dink at its head and his weekly paper *Agos*, which was launched as the first Armenian- (and Turkish-) language periodical in the republican period and which acted as the organ of historical truth on this matter. (Our readers are probably aware that this Armenian socialist intellectual was assassinated by a goon in a plot prepared meticulously by the Turkish state.) It is an unfortunate fact, hardly palatable, that a majority of the socialist and communist left forces of the country have simply disregarded, if not actively denied together with all establishment political forces, the question of the Armenian genocide. As proletarian internationalists, we revolutionary Marxists feel duty-bound to unearth the truth about that tragic moment in the life of the region.

The article in this issue by Sungur Savran does this in a three-dimensional manner. It does not engage in the numbers game, simply noting that even the figures of casualties provided by the negationist historians, oscillating in the range of 300 to 600 thousand, amply sustain the idea of genocide for a total population of at most one and a half million souls (the count being much higher in other sources of course). His article proceeds from the assumption of the existence of a genocide. By clearly explaining the *raison d'être* of the genocide in historical, economic and political terms, Savran renders this seemingly opaque act of collective cruelty transparent for the public. However, he does this by using a scientific methodology that is entirely off the beaten track in the conventional account provided by liberal historians of Turkey, nationalist historians of the Armenian diaspora and imperialistically bent commentators elsewhere. The ordinary discourse on the Armenian genocide within Turkey is philosophically utterly idealistic, attributing the crime to the political and ideological “mentality” of the leadership of the Committee of Union and Progress, the bourgeois party that ruled Turkey between the 1908 revolution and the defeat of the Ottoman Empire in the war in 1918. The discussion on the Armenian side and in imperialist countries, on the other hand, relies almost entirely on “national” or at times even “ethnic” interests, sometimes even going so far, in personal exchange, as to place the blame on the “evil” that resides in the “Turk”. As the title of his article makes clear, Savran proceeds to explain this tragic event through the lens of the struggles between the different classes actively fighting at the international, regional, and national levels, the latter level focussing not only on the Turkish side, but also on the Armenian and Kurdish sides.

And thirdly, the author does not make do with an analysis of the causes and consequences of this tragic event, but focusses on the mistakes of “our side”, this side not defined of course in national but in class terms. He goes into the strategic and tactical mistakes of socialist parties, including weaknesses in the position of the Bolshevik Party on the Armenian question, and reflects on the methods of the harnessing of the burning national conflicts in the region to the overall interests of the proletariat of the region in its multinational composition.

Alp Yücel Kaya, in his article entitled “Political Marxism: A Refutation”, discusses and criticizes the historical approach that Political Marxists put forward to analyze the origins of capitalism and/or capitalist development. Kaya observes that their theoretical starting point as well as their critical perspective towards the

Marxist literature examining capitalist development and bourgeois revolutions is that Marx's early work (the *German Ideology* and the *Communist Manifesto*) followed the narrative of historical development promoted by liberal historians and political economists and Marx broke with the liberal paradigm only with the *Grundrisse* and *Capital*. Kaya focuses in his article on this starting point, which serves as a theoretical basis in Political Marxists' exposition of the origins of capitalism, that is, periodization and differentiation of Marx's works and their immediate corollary, repudiation of the concept of bourgeois revolution by Political Marxism. Kaya argues that the perspective of historical materialism that the "young" Marx developed did not follow Adam Smith ("commercialization model" or four-stage theory of history) as Political Marxists argued but rather the German Historical School of Law; Marx's critical perspective led him, however, to supersede and conserve the formulations of the historical school of law as his critique of political economy superseded and conserved the formulations of the classical economists. The author does not concur with the view that Marx accepted the narrative of historical development promoted by bourgeois historians, as Marx's relationship with bourgeois historians is analogous to his relationship with bourgeois economists; Marx's approach to historical materialism is founded on the critique of bourgeois historians. Furthermore, according to Kaya, to reduce the concept of the bourgeois revolution, which gained prominence with Marx, to a simple struggle between the two classes (bourgeoisie-aristocracy) as bourgeois historians did (as well as some post-Marx Marxists did following Plekhanov) is to adopt a limited perspective when examining Marx's work. Kaya argues that Marx considered the struggles of the working people, the *sans culottes*, the *brasnus*, and the *Enragés* in his analysis of the French Revolution. By emphasizing maturation in the form of continuity and not rupture in Marx's works, Kaya asserts that thinking about the French Revolution led him to formulate the basic premises of the theory of permanent revolution and the theory of uneven and combined development.

Ana Bazac's article engages in a thorough discussion on Immanuel Kant's philosophy. The year 2024 was the tercentennial of Immanuel Kant's birth (1724-1804). On the occasion of this significant anniversary, Bazac has written a wide-ranging study on the relevance of Kant's world-renowned ethical principle, the categorical imperative, for revolutionary politics. This study does not only leave no stone unturned with respect to Kant's maxim, but also delves practically into contemporary world politics, raising questions and providing answers on concrete events of our epoch such as the wars in Ukraine and Gaza. In its last part, it also compares the approach adopted by Kant and by Marx to these questions.

Savvas Michael-Matsas' article, on the basis of his presentation at the Third International Trotsky Gathering held in Buenos Aires, provides an insightful picture into the multi-faceted global dynamics at work as well as the tasks lying ahead for revolutionaries. His analysis spans all across the world to show the imminent peril of a worldwide and catastrophic war. From this analysis emerges a crystal-clear conclusion: the need for a fight waged by the parties of a revolutionary International and tactical flexibility towards the peace movement and other anti-imperialist forces.

Burak Gürel's article, originally published in Turkish in 2022, examines in detail the class struggles in China in the recent period, the deepening contradictions

between China and imperialism, and the factional conflicts within Chinese capital and the Chinese Communist Party. Gürel shows that Xi Jinping initially extended a helping hand to Chinese capital—whose profits were being eroded by the rising labor movement and the impact of the third great depression—and that he employed state violence intensively to suppress that movement. Moreover, Gürel emphasizes that the factional struggle within the Chinese capitalist class intensified, revealing that Xi supported high-tech companies over industrialists reliant on low technology and financial speculators, a stance that led to widespread purges within both the party and the state.

Gürel's analysis demonstrates that by supporting high-tech companies, the Chinese state is attempting to shift China from the semi-periphery of the world economy to the imperialist core. At the same time, imperialist states are mobilizing to thwart this shift, thereby laying the groundwork for a third world war. The article also shows that these problems and contradictions have become explosive due to the impact of the COVID-19 pandemic. Although China initially distinguished itself from the rest of the world with its "zero-COVID" policy during the first year of the pandemic, the failure of its domestic mRNA vaccine projects eventually forced the country into large-scale lockdowns, crippling the economy and social life. The article further highlights that, despite Xi's victorious emergence from the CCP 20th Congress, he has been cornered by contradictions related to the pandemic. In the final section, Gürel demonstrates that the successful struggle of workers at the Foxconn factory in Zhengzhou—one of the world's largest factories—sparked a series of events that culminated in mass protests spilling over onto campuses and streets in the final days of November 2022. These events deeply undermined Xi's supposedly unassailable power and forced him into a complete U-turn from the "zero-COVID" policy. Gürel concludes his article by pointing to revolutionary possibilities in China in light of the lessons from the third great depression, class struggles, and the November 2022 wave of protests.

Levent Dölek focuses on the 2024 local elections in Turkey in his article titled "March 2024 Municipal Elections from a Class Politics Perspective." He examines the results of the local elections in terms of establishment politics and draws lessons in line with class politics by focusing especially on the impact of the economic conditions. Dölek also criticizes the support of the socialist organizations in Turkey to the CHP, a bourgeois party and points to the need for working-class politics. According to Dölek, the uptick in the working-class movement will continue in 2025. He points out that experience has shown that the bourgeois opposition, due to its class interests, will compromise with despotism in Turkey once again, while the working-class movement remains capable of mobilizing even those toiling masses still under the ideological hegemony of autocratic parties such as the AKP and MHP in the struggle for bread and freedom.

Kutlu Dâne answers some frequently asked questions about the Al-Aqsa Flood Operation and the developments that followed in his article. The author, who is one of the spokespeople of the Friends of Palestine Against Imperialism and Zionism, first offers a brief account of the Zionist genocide, which is now in its second year, and then summarizes the atrocities that the Palestinian people face in different dimensions in order to understand why the Palestinian resistance organizations carried out this

operation, which at first glance might seem like a suicide mission. Then, he addresses the issue of supporting Hamas from a revolutionary Marxist perspective, especially against the confusion that the Islamic organization Hamas which held the leadership of the Palestinian side during and after the Al-Aqsa Flood, created within the socialist movement. The issues that Dâne draws attention to in the last section of the article remind us once again that the struggle of the Palestinian people against the Zionist genocide is of burning importance not only for the Palestinians but for all the workers and laborers of the region.

We are also proud to publish the English translation of an important historical document of the Palestinian left, its first appearance in English. This text, titled *Revolution and Workers*, comes from a speech given by the founder of the Popular Front for the Liberation of Palestine (PFLP), George Habash, to the people gathered for the May Day celebrations in the Jabal al-Husseini neighborhood in Amman in 1970 – just before the Black September that would unfold later that year. In his speech, Habash emphasizes the central role of the working class in the struggle for the liberation of the Palestinian people and opposes it to the reactionary bourgeoisie whose interests are linked to colonialism.

The year 2024 was the twentieth anniversary of the death of one of the foremost Marxist economists of the twentieth century, Paul M. Sweezy. He was a very influential figure both in his own country and around the world, not only for his books and articles, which reached a wide audience, but also due to the very wide impact made by *Monthly Review*, the theoretical journal that he co-founded with Leo Huberman and Paul Baran in 1949 and, after their death, led together with Harry Magdoff. Sweezy's 1942 book *The Theory of Capitalist Development* was a primer for young Marxists for decades. But the work that influenced generations of theoreticians was penned together with Paul Baran and titled *Monopoly Capital*. The underconsumptionism that marks the entire oeuvre of the Monthly Review school was the result of the fact that the Great Depression of the 1930s was a major formative factor in the development of all four major thinkers of the school, as well as of their intellectual debt not only to Keynes, but also to Michał Kalecki. Our comrades Sungur Savran and E. Ahmet Tonak conducted an interview with Paul Sweezy back in 1986 for the Turkish Marxist journal *11. Tez* (Thesis Eleven). Later *Monthly Review* itself decided to publish the interview in its English original. We are publishing that interview in this issue in memory of Sweezy, as a homage to his long-standing defence of Marxism and his intransigent anti-imperialism.

Six months ago, two of our authors, editorial board member Sungur Savran and frequent contributor E. Ahmet Tonak, jointly published a book titled *In the Tracks of Marx's Capital* (Palgrave-Macmillan, 2024). The book brings together their articles, written singly, jointly, or with other co-authors at different times, on Marx's political economy or using Marx's method and theory to inquire into different economic aspects of contemporary capitalism. In a dossier devoted to this book, we bring together three pieces here in order to give our readers a well-rounded idea of the book's various facets.

The first piece is by Korkut Boratav, indisputably the *doyen* of Marxist economists in Turkey. He is professor emeritus of Ankara University and has been active publishing

many books, chapters and articles, as well as, more recently, weekly columns in left-wing newspapers and internet sites about economic and political developments in Turkey and internationally, adopting a very oecumenical posture with respect to the different political currents within the left. He is the public intellectual *par excellence*. Boratav wrote the preface to the Tonak-Savran volume, in which he introduces the various parts and chapters for the benefit of the reader and gives his own brief assessment of the various controversial issues discussed in some chapters.

The second piece is by Michael Roberts, whose blog has over the years become a kind of Mecca for Marxists around the world when it comes to the burning economic questions of our time. In a very favourable review published on his blog, Roberts both introduces the reader to the overall contents of the book and provides his assessment of Tonak and Savran's treatment of the issues taken up. While in general agreement with the overall orientation of the authors, he takes issue with some of the opinions that are expressed in certain chapters and deepens the discussion on those questions.

As the last piece of both the dossier and the 2025 edition of *Revolutionary Marxism*, we are publishing a review of the book written by a young Italian Marxist, Sergio Crescenzi. Crescenzi is a member of the *Collective Le Gauche*, which can best be described as a research group of independent Marxist authors that seeks to influence the Italian public debate and to raise the quality of that debate through analyses and proposals based on scientific socialism. It aims to become an intellectual point of reference for militants in trade unions, parties and social movements in Italy. The group is very young, everyone being under thirty years of age and is mostly made up of university students at different levels of their studies. Having been formed about ten years ago, the *Collective* has always been characterised by what they regard as a "productive heterogeneity", with *operaistas*, Hegelian-Marxists and others coming together and with members focused on a diversity of areas of study. They consider this to be their strength, since this "internal negativity" continually stimulates the refining of positions. Finally, they are trying to find a "common grammar" and to articulate better their lines of research.

Crescenzi undertakes a very comprehensive and analytically detailed treatment of Savran and Tonak's book and usually expresses agreement with the authors' assessment of various issues, occasionally comparing these with the work of some Italian Marxists. However, there are a few secondary aspects on which he points out his differences with some arguments. This is a very informative review of the Savran-Tonak volume.

We hope that 2025 will not be the exclusive hunting ground for those of the ilk of Trump, Netanyahu, Milei, Modi, Erdoğan or Le Pen. We wish our readers in different parts of the world, as well as in Turkey itself, a successful year of class and political struggles that strengthens the position of and brings gains to the international proletariat and the oppressed of the world.

# The Armenian Genocide as Class Struggle<sup>1</sup>

Sungur Savran

*Lights have come on at Karabet's grocer  
This Armenian citizen did not forgive  
The slaying of his father on Kurdish mountains  
But he loves you, for neither have you forgiven  
Those who have stained the Turk's brow with that blood.*

*Nâzım Hikmet (1951)*

*In the person of the leader of the Baku Commune, the Bolshevik **Stepan Shaumian**, the "Caucasian Lenin", as he has been called, and, we would add, the Mustafa Suphi of Armenia, to the cherished memory of the hundreds of thousands, nay millions, of our akhbarighs and kuirighs (brothers and sisters) who lost their lives as a result of the savagery of the policies of the reactionaries and the imperialists of Turkey, Kurdistan, Russia, Germany, Britain and others...*

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<sup>1</sup> This is the translation into English of the author's article published in Turkish in 2015, on the occasion of the Centennial of the Armenian Genocide, in *Devrimci Marksizm*, No. 23, Spring 2015. The translation is by the author himself. The article being published here is almost the same as the Turkish version in all essentials. There was just a bit of shortening in certain parts which would be of less interest to an international audience than a Turkish one. The best example is Section 11 below titled "The National Question in Anatolia", where there was some shortening of the text because that section treats a question that is dear to the heart of Turkish and Kurdish audiences, but would have been, in its original form, a bit too long-winded for foreign audiences. In addition, some footnotes throughout the article that provide excursions outside the main argument or refer to sources that are of no interest to a foreign audience were omitted. Nothing essential has been changed. The argument stands in exactly the same shape as the original. Here and there we have made changes so as to avoid crying examples of anachronism (cf. the first sentence of the main body of the article).

*And to the memory of the bitterly missed **Hrant (Dink)**, “the last Armenian” as we called him when he was assassinated, almost a century later, on 19 January 2007.*

110 years have gone by since one and a half million Armenians, men and women, elderly and infants, were deported in Anatolia and Mesopotamia, what is now the territory of the Republic of Turkey, from provinces as distant from each other as Bursa and Diyarbakir and Trabzon and Adana, of which a great majority were massacred systematically on the road. Unimaginable sexual violence was practised against women. The survivors were either forced to emigrate to other climes or were forcibly Islamised. It is impossible not to suffer unendurable heart pangs when talking about such atrocities. Especially for those of us who grew up in the Istanbul of the 1950s and the 1960s, among Armenian, Greek, and Jewish families, the physical and spiritual reality of such a mass-scale massacre is all the more heart-rending, despite the anachronism of the event and our lifetime. They were *akhbarighs* and *kuirighs* for us. That is how we were brought up.

If the remainder of this article provides a cold-blooded analysis from within the universe of historical materialism, this is not because it is the only disposition we nourish toward the events of 1915. That year evokes in us, first and foremost, rage, horror, revolt. It calls forth the desire of embracing the dead body of one’s sister or brother and sob one’s heart out. But if we wish to prevent the recurrence of this squalor, this atrocity, this savagery, then we simply cannot make do with lamentation. Understanding is as important as grieving. To understand so as not to allow it to happen again! Not against the Armenian, nor the Kurd. To prevent the mini-rehearsal that the Roboskî massacre stands for.<sup>2</sup> To forestall a repetition of the Anfal.<sup>3</sup> To forbid the export to other climes of what has been done in early 21<sup>st</sup> century in Sri Lanka to the Tamil people.

To be able to achieve this, that is, to put an end to acts of genocide not only in Anatolia, Mesopotamia and the Caucasus, but the world round, we need to understand what the drivers of acts of genocide are. Social Darwinism, racism, chauvinism, the “CUP mentality”<sup>4</sup> or whatever you may care to add to this list, it is our contention that factors that derive from “the universe of mentality”, “the imaginary”, as it has been fashionable during the recent decades to call such factors, are inadequate to explain genocide. Important as it may be to understand the ideological phantasms that inhabit people’s minds, these invite a question that needs to be answered: why is it that these phantasms inundate the minds of millions at precisely that moment in history? We submit that the answer lies in class struggles and, hence, that only the conceptual framework of Marxism, the historical materialist method can shed light on the processes of genocide. Only thus can we understand them. Yet that is not all.

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2 The killing in December 2011 by air bombardment by the Turkish Armed Forces of 34 young Kurds, half of them minors, as they were crossing the border between Turkey and Iraq for the purpose of petty trade as frontier residing Kurds do routinely.

3 The massacre of thousands of Kurdish civilians by Saddam Hussein of Iraq through the use of chemical weapons in 1989, towards the end of the Iran-Iraq war.

4 The CUP was the leading party of the first bourgeois revolution in Ottoman Turkey in 1908.

Once we understand, we need to evict this prime mover from the face of the earth. This article will try to contribute to this effort by looking at the pinnacle of genocide in our region and territory, i.e. the Armenian genocide.

## Introduction

The unprecedented decline of the influence of Marxism within the intellectual life of humanity at large during the last half century, its crowding out of the field by postmodernism and its self-styled identity politics, results in the perception of national questions in a superficial, one-dimensional light ***as if national questions were simply ethnic questions***. A very prominent instance is the series of wars waged over former Yugoslavia in the 1990s. Considering these wars the irrational reawakening of the mutual hatred between peoples that goes a long way back in history, characterising them as a historic settling of accounts between Orthodox Serbs and Catholic Croats and Muslim Bosniacs is perhaps the dominant view or, in any case, extremely widespread. Very rarely did writers on those wars at least pose the question of why this historic hatred burst forth from within a situation that was predicated upon an exemplary coexistence of these same ethnic groups rarely seen in history, if not unique, that the Federal Socialist Republic of Yugoslavia (1943-1992) represented. The idea that ethnic identity is more important than anything else is so deeply entrenched in people's minds that the reasoning may be summarised as follows: Ethnic wars simply happen. Full stop. They do not even need to be explained. As a matter of fact, when scrutinised from close up, one can easily see that the part played, on the one hand, both by the imperialist countries of Europe (first and foremost Germany and Austria and their ally the Vatican) and the United States and, on the other, the self-serving interests of the bureaucracy of each republic and the instinct of protection harboured by the peasantry of each people were the ammunition of that war.<sup>5</sup>

On the solemn occasion of the 110<sup>th</sup> anniversary of the Armenian genocide, it must be observed that it is very common to wilfully ignore the part played in that historic event by social classes, various layers and fractions of such classes, and imperialist forces that bear the mark of class struggle. The fact that the literature that examines the genocide seriously is of a nationalist nature on the Armenian side and a liberal nature on the Turkish side has played a decisive part in this is hardly worth explaining. Take, as an example, one of the best historically documented books on the issue by Vahakn Dadrian, one among many students of the genocide from within the Armenian diaspora. The subtitle (in the Turkish edition) is *Ethnic Conflict from the Balkans to Anatolia and the Caucasus*. The word "ethnic" is doubly significant. Even if Dadrian used the word "national" instead of "ethnic" that would still be significant. For in the period and the region he studies, the great struggles that led to the Armenian genocide were by no means exclusively national. But even "national" was not sufficient for Dadrian. For him, the sheer fact of the erasure of

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<sup>5</sup> See our treatment of the war in Yugoslavia in *Avrasya Savaşları. Körfezden Afganistan'a Yeni Dünya Düzeninin Kuruluşu* [Eurasia Wars. The Establishment of the New World Order from the Gulf War to Afghanistan], Istanbul: Belge, 2001, Chapter 3, pp. 63-142.

the Armenian “ethnic” group by the Turkish “ethnic” group was all that mattered (we shall duly see that since the Kurdish “ethnic” group was also involved the event was not purely one between Armenians and Turks). Let there be no mistake: his research is impeccable. Thus, what we have just said does not detract from the value of his work. It only goes to show that his point of view is decidedly problematic.

The Turkish side requires more attention. The primary force that has acted to catapult the question of the Armenian genocide on the public agenda and to make inroads into the domination of the denialist front here was, of course, Hrant Dink and the weekly newspaper *Agos* that was his brainchild and which he orchestrated skilfully for long years. But when we turn from the Armenian community to the Turks at large and pose the same question, we need to admit a simple truth from the outset: it was predominantly the liberals on the left who worked on the question, conducted research, and waged a fight. We also need to grant the further fact that it was those socialist parties and associations on the left that supported Erdoğan all the way up to the popular revolt of 2013 ignited by the Gezi Park uprising. There are certainly exceptions: the part played by the Belge publishing house, led by Ragıp Zarakolu and his long-deceased former wife Ayşe Zarakolu, was truly the work of a vanguard in this area. There are other exceptions from within the Marxist intelligentsia. But overall, it was left-wing liberals and activists who worked tenaciously to try and raise consciousness within Turkey on this historic catastrophe. It was also they who organised the epoch-making 2005 “Armenian Conference”. Writers such as Taner Akçam, Halil Berktaş, Ayhan Aktar, and others pursued the matter with perseverance and courage and shed light on many an aspect that had remained in the dark for decades. The various conferences that were held in Istanbul on the centenary of the 1909 Adana massacres, in Diyarbakir in 2011 on the part played by the Kurds in the genocide, and once again in Istanbul in 2014 on the forcible Islamisation of Armenians opened up new horizons, all of them due to the devotion of these liberal academics to the elucidation of the question. At all these conferences, a majority of the presentations were made by left liberals.

Having paid our tribute to them, let us also note that the liberals did not concede to Marxists what is due to them in the same fashion. It was Belge publishers that brought the Armenian question on the agenda for the first time in Turkey, having published a succession of books on the question almost single-handedly while everyone else kept silent. The left liberal team that controls the foundation established in memory of Hrant Dink has been giving out awards to a host of personalities each year, but refrained from awarding Ragıp Zarakolu, the surviving member of the two editors of Belge, while hypocritically according the same prize to Ahmet Altan, editor at the time of a supposedly left-wing liberal newspaper, who wilfully and maliciously repressed the publication of information emanating from the European Court of Human Rights with respect to Hrant Dink so that it would not put the Erdoğan government in a bind.

To return to our main topic, the fact that the material bases and the class struggle dimensions of the Armenian genocide have not been brought to the fore in the Turkish setting has certainly been a product of this fact of the predominance of liberal researchers in the study of this question. Let us once again proceed honestly

and concede again the fact that it would be unjust to claim that elements relating to class struggle do not play any part in the literature produced by liberal authors and researchers. To cite but the most striking instance, one of the works produced by Taner Akçam, the author most hostile to Marxism among the foremost students of the Armenian genocide, focuses directly on the question of the so-called *Emval-i Metruke* ("Abandoned Property"). The intention for turning to this aspect may be quite different from that of Marxists, but the question of the material bases of the genocide has thereby been brought under the microscope.<sup>6</sup> Other such topics relating to material bases and class contradictions have been raised in a fragmented manner in this literature in terms of facts cited. But the issue of the material and class bases of the genocide appears in the literature developed in Turkey (and of course we are talking about the non-negationist literature here) **not as determining factors**, but as secondary, auxiliary or incidental aspects. What lies at the centre of the liberal literature is the "Turkish identity".<sup>7</sup> It is what has been labelled in Turkish as the "İttihatist mentality", the concept referring to the mentality of the leaders of the Committee of Union and Progress (henceforth the CUP), to which we will have ample opportunity to turn to below. In other words, loyal to its own methodology, liberalism establishes the causal or determining mechanisms around the "universe of the mind" and, in solidarity with postmodernism, brings the question of identity to centre stage.

In clear contrast to this procedure, our approach will be to attempt to understand and explain the genocide and the road that led to the genocide within the framework of class contradictions and material interests. We will then see that the Turkish-Armenian conflict cannot be conceived as a question that can be tied to "ethnic" roots, let alone grasped on the level of "national" bases in the abstract. Each national question is laden with class. For this reason, one and the same national question is **interwoven out of a diversity of national questions**. The Armenian question is one thing for the traditional ruling classes of Ottoman society, another for the up-and-coming Turkish bourgeoisie, still another for the Kurdish tribal leaders. It is an entirely different question for the well-established, quasi-aristocratic Armenian large commercial and financial bourgeoisie, if such a question may really be said to exist for them. It is one question for the poor Armenian peasant of Anatolia and another for the Armenian intelligentsia emanating from the modern bourgeois and petty-bourgeois classes rising in Eastern Armenia under the Czarist regime of Russia.

This article will try to comprehend the genocide as the combined product of these different national questions. We will also bring into the picture the political representatives of the different classes depicted above, i.e. their political parties as factors that influence the shaping of events. We will then see that, although the genocide cannot be reduced to class struggles, it still represents the particular path

<sup>6</sup> Taner Akçam/Ümit Kurt, *Kanunların Ruhu. Emval-i Metruke Kanunlarında Soykırımın İzini Sürmek* [The Spirit of Laws. Tracing the Genocide in the Legislation on Abandoned Property], İstanbul: İletişim, 2012.

<sup>7</sup> See, for instance, Taner Akçam, *From Empire to Republic. Turkish Nationalism and the Armenian Genocide*, London: Zed Books, 2004.

that a multitude of class struggles take under the specific conditions of the time and the space in which the genocide occurred.

We need to stress two points. First, this article is not a work of history that intends to convey to experts or to the general public the results of research carried out by its author. The author is no historian. The empirical material of an original character that he offers the reader is minimal. What we aim to do here is to reinterpret and analyse the already existing empirical material on the basis of the materialist conception of history and to adopt a political position that flows from that analysis.

The second point is connected to the first, but only partially. The idea, adopted by the negationists of Turkey, that the debate on the genocide had better be left to historians is not as “scientific”, we believe, as it sounds. The reason is that historians, Turkish historians in this specific case, have, in the guise of “objectivity” and “impartiality”, resorted to remaining silent or distorting the truth and, oftentimes, to outright lies. Hence, the fact that we are not a historian does not imply that we need to concur with them and doubt the claim that a genocide was perpetrated on Anatolian soil in 1915. For us, this is as glaring a fact as the genocide perpetrated against the Jews and the Roma by the Nazi regime in Germany. For eyes that wish to see this, numerous pieces of evidence have been presented in numerous sources. Beyond the voluminous international and domestic literature available on this score, even the “Open Letter” we publish in this issue on its own presents arguments and evidence sufficient to convince the reader. Thus, this article will not try to answer the question “was there a genocide?”<sup>8</sup> It will touch upon certain points we deem important with respect to questions such as who is responsible for this genocide, who needs to answer for it or, in other words, who is the criminal in this vile act.

We can then turn to the heart of our topic.

## **1. Amira and peasant**

In order to grasp the historical base on which the Armenian genocide arose, we need to dwell on two major particularities of Armenian history that define its specificity.<sup>9</sup> The first particularity one should point out is that all throughout history the territory inhabited by the Armenians was the subject of rivalry between two or three powerful empires. In the modern age, this means the squeezing of Armenia between the Ottoman Empire and Czarist Russia. Despite the fact that historically there was always an Armenian population living in Iran, this country did not exert a pressure on Armenia as powerful as the former two in the modern age. What has just been said should force the reader from Turkey to check his or her geography anew. The country called Armenia consists of two parts, one in Anatolia or Asia

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8 “Ermeni Soykırımı Tartışmaları. Gururu İncinen Türk İşçi ve Emekçilerine Açık Mektup” [The Controversy on the Armenian Genocide. Open Letter to Turkish Workers and Toilers Whose National Pride is Wounded]. This “Open Letter” was published in the same issue of *Devrimci Marksizm* (No. 23, Spring 2015) as this article.

9 We base our general account of Armenian history on the following two sources: Razmik Panosian, *The Armenians. From Kings and Priests to Merchants and Commissars*, London: Hurst & Company, 2006 and Ronald Grigor Suny, *Looking Toward Ararat. Armenia in Modern History*, Bloomington: Indiana University Press, 1993.

Minor (conventionally designated Western Armenia) and the other in the Caucasus region (called Eastern Armenia).<sup>10</sup> It is a historically established political and legal convention to regard six Ottoman provinces of Eastern Anatolia as Western Armenia: Erzurum, Sivas, Van, Mamüretül Aziz (roughly today's province of Elazığ), Bitlis and Diyarbakir, as they are called today, these six provinces are labelled *Vilayât-i Sitte* in Ottoman parlance. As for Eastern Armenia, this corresponds roughly to today's independent Republic of Armenia, give or take Nagorno Karabakh. The history of the Armenian people can only be correctly situated as the combined and uneven development of these two geographic parts, Western and Eastern Armenia.

This state of being squeezed between the hammer and the anvil of two empires led to two significant historical outcomes. First, this people that distinguished itself from other ethnic groups through its unique alphabet and its own church (the Armenian Gregorian Church) became a nation without a state not from the outset but under the stress of centuries of experience. This status of a stateless nation is one factor that may partially explain the fact that within the decidedly multinational composition of the Ottoman Empire, the Armenians became so integrated with the Turks as to be considered to be the *millet-i sâdıka*, in other words the "loyal nation". Having said that, let us stress the fact that this was one factor among many. We will return to this point.

A second particularity of Armenian history is seen in the fact that, like the Jews, the Armenians were an ancient trading nation from time immemorial. They cast their net surprisingly wide. At one end India was a home to the Armenians, at the other Venice stood out! The Armenian communities most powerful economically resided not in Yerevan, the present-day capital city of Armenia, or the largest centre of affairs in Western Armenia, Erzurum, but in Tbilisi, which is today the capital of Georgia, or, even more importantly, in Istanbul, home to the court of the Ottomans and formerly the capital city of the Eastern Roman Empire and later of Byzantium (under the appellation Constantinople). In other words, Armenian economic and cultural life flourished fundamentally outside of Armenia proper. At the basis of all this lies the fact that the Armenian class of merchants amassed great economic power from the Middle Ages on and settled in distant locations to establish an international trade network.

We need to draw two conclusions from this latter point. The first conclusion is that, almost as an irony of history, the Armenian people had wielded, from a very early historic stage, an almost natural skill of adaptation vis-à-vis the development of capitalism. Having formed colonies in a strikingly wide variety of geographic locations, the Armenians, on the one hand, naturally developed advanced linguistic skills very early on and, on the other, created, on the basis of the trade network already established, a commercial and financial bourgeoisie that grew swiftly as

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<sup>10</sup> The Caucasus is divided into two parts: the northern region lies within the borders of the Russian Federation; the southern region has been divided, quite controversially in parts, among three nations (Armenia, Georgia, and Azerbaijan). The Caucasian Mountains form a natural frontier between the two parts. That is the basis for the name "Transcaucasia" that Russians have given to the southern half of the region. Seen from the Middle East (or Western Asia), this half cannot be called that name and is best called Southern Caucasus.

middlemen for Western European capital as capitalism progressed in the modern age. Moreover, this advanced economic culture made it possible for Armenians of more modest social standing to adapt much more rapidly than other peoples they co-existed with to new technologies, allowed the Armenian communities wherever they lived to develop artisans of the highest quality, and, in time, when an Ottoman proletariat started to come into being, cast Armenian workers to the forefront of the stratum of skilled workers in the struggle between classes.

The second conclusion is somewhat a corollary of the first. This is the rise, in Istanbul, the Ottoman capital, of an extremely powerful Armenian bourgeoisie from the 18<sup>th</sup> century on in the various areas of trade and finance as well as in the artisanal and technological spheres, designated with a special name peculiar only to this wing of the bourgeoisie, the *Amira*.<sup>11</sup> Ordinary words cannot describe the glory and splendour of this class (or class fraction). They are merchants and money-dealers and lapidists (skilful diamond artisans) and jewellers. Because they have proved their worth and because they are culturally so much more advanced than their peers, the Sultans entrust them with many an institution and make it possible for them to reach the zenith of power. They are accorded sumptuous titles such as the Amira of the Royal Mint or the Chamberlain of the Order of Money-Dealers or the Superintendent of Customs or commercial agent of the Anatolian Company of Goldsmiths or the chief merchant of the Head Vizier. They can be appointed to the higher echelons of the state bureaucracy. They were even entrusted with military positions: the post of “barutçubaşı” (i.e. head of the supply of ammunition for the army) remained the exclusive turf of the same Armenian family for two centuries. And they are, most notably, the head architects of the Court.

It would be more appropriate to consider this bourgeoisie akin to the fraction of the bourgeoisie in Western Europe that dealt with long-distance trade and finance in the early stages of capitalist development, more properly the mercantilist age, a fraction that bore certain aristocratic traits. This bourgeoisie and, in particular, its upper layers, carry out their business on the basis of concessions accorded by the Sultan’s government. Thus, their interests are deeply interwoven with the dealings of the state and the Court. They are fundamentally dependent on the favour of the Court. This led to the emergence of dynasties that are replicas of that which rules the Empire. At the top tier of the Amira, certain families monopolised certain industries within the Ottoman economy for close to two centuries (the 18<sup>th</sup> and the 19<sup>th</sup>).

The Amira Bezciyan, characterised as the “Amira of the Amira”, both created a family tradition in the cloth and silk trade and was appointed as the Mint Amira by the Sultan. (The family name derives from two words, “bezci” meaning the dealer of cloth and the suffix “yan” meaning “son of” in Armenian.) The Dadyan family held the post of head supplier of ammunition to the army from the early 18<sup>th</sup> century on all the way to late 19<sup>th</sup>. The economic clout of this family continued well into the 20<sup>th</sup> century, all the way to mid-century, even though with the abolition of the Sultanate, the post of “head supplier of ammunition” itself became history. The

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<sup>11</sup> The word is said to derive from the word “emir” in Turkish, meaning “khan” or “ruler”. That implies it is very much a term that is specific to the region.

Düzyan family stood at the head of the jewellery industry for two centuries. The Çerezian and Papazian families were extremely powerful actors in economic life throughout the 19<sup>th</sup> century. As for the Balyan family, they were the Court's head architects all throughout the 19<sup>th</sup> century and put their seal on Istanbul's modern architecture, in particular in the widely-acclaimed Pera neighbourhood. The position of these families resembles that of an aristocracy so closely that, despite the absence of a land-based aristocratic caste/class under the Ottomans in contrast to Western Europe, these families may be considered to be akin to a "*noblesse de robe*" of the later period of the *ancien régime* in France. The term "zadegân" ("magnate") in Ottoman Turkish would apply to no other social group so fittingly.<sup>12</sup>

It is self-evident that such economic power is bound to engender social power. The Church, which in the Ottoman social system of "millet" ("nation") was equipped with the prerogatives of worldly power, was brought, through a multitude of channels, under the control of the Amira. Is it not obvious that the Amira, which met all the economic needs of the Church, shouldered the costs of building new chapels and maintaining and mending the existing ones, shared out among its members all the seats on the boards of trustees of all the cathedrals, churches and chapels and thus fused its worldly power with divine power, financed all the schools, hospitals, hospices, and charities of the Armenian community, and dominated the cultural life of the Armenians would be in full control of the orientation of the community?

Thus, is it not obvious that an Armenian community under the domineering influence of the Amira, whatever nuances may subsist between the sentiments of different classes and of inhabitants of different regions, would nonetheless clearly bear the traces of the outlook of the Amira on the Ottoman Court? We have already pointed out that the Amira owed its socio-economic clout directly to its ties with the Court. Its interests were woven with a million threads into the fabric of the Ottoman socio-economic order. Can there be anything surprising in the appellation *millet-i sâdika* (the "loyal nation") used for the Armenian community when this community was under the domination of this class? It is, then, possible to reach the following conclusion with mathematical precision: At least until the late 19<sup>th</sup> century, for the Armenians of Istanbul, and at their head the Amira, there was **no "Armenian question"** worth discussing. There is no national question in this context.

This is not true for other sections of the Armenian community. For one thing, the development of the Armenian bourgeoisie in the Caucasus pursued another course. There the old class of merchants oriented itself gradually towards integration with the circuit of modern capitalism, initiating thus a process of transition toward an industrial bourgeoisie. This process matured with the formation of a capitalist class in the manufacturing industry in Tbilisi, first and foremost in the textiles industry, and in the petroleum industry and its derivatives in Baku. As the Armenian bourgeoisie was morphing into an industrial one, a proletariat was

<sup>12</sup> The source of this information is the following: Levon Panos Dabağyan, *Geçmişten Günümüze Millet-i Sâdika-I. Osmanlı Ermenileri*, [The Loyal Nation from Past to Present-I. Ottoman Armenians] Istanbul: Yedirenk, 2010, pp. 229-378. Furthermore, see Panossian, op. cit., pp. 85-86 and 148-151.

naturally coming into existence at the other pole. Armenians also took the lion's share in this new proletariat. That is why the ideological currents of the age and the political organisations that these gave birth to made their leap forward in the Armenian community in the Caucasus rather than Istanbul and Western Armenia. The intellectual layers that came out of the bourgeoisie and the petty-bourgeoisie became the bearers of these modern ideologies, of nationalism and socialism, and to a much lesser extent of liberalism. The Armenian proletariat, for its part, engaged in political organising. We would like to point out that we have not mentioned Eastern Armenia, but focused on the Caucasus, since this development was not confined to Eastern Armenia proper, but was even more marked in Tbilisi and Baku, where the Armenian bourgeoisie had historically been more powerful.

The history of Armenian nationalism extends in fact way back into the past. The first phase of the development of nationalism has always and everywhere been marked by the formation of a nationalist intelligentsia and the reordering of language, history, literature, art and folklore in line with the new nationalist ideology. Thanks to the internationally dispersed character of the class of merchants sustaining their existence within the cells of precapitalist societies, with the Armenians this process started and progressed in the diaspora. The publishing activities conducted in India were accompanied by the work of the religious order named the "Mkhitarists" on the Armenian language, literature, and history in Venice and Vienna.<sup>13</sup>

These efforts reached their apogee in the 18<sup>th</sup> century, followed by the spread of nationalism among the masses in the 19<sup>th</sup> century. The rise of Armenian nationalism relied on three elements that had served to hold the Armenian people in unity despite the vast geographic distances that separated various communities: the Armenian language, the unique alphabet of that language, and the Armenian Gregorian Church. That is why Armenian nationalism includes certain trends that largely rely on ethnic characteristics and claim the existence of the Armenian nation since time immemorial. Despite its vast wealth and its cultural advancement, the contribution of the Istanbul Armenian community to the development of this nationalism is limited. In fact, Migirdiç Kirimyan (also known as Kirimyan Hayrik or "Father Kirimyan", father here standing not for a priest, which Kirimyan as a matter of fact was, but a "baba", a paternal figure), who is, historically speaking, one of the most important leaders of Armenian nationalism, while he was serving as the Bishop of Istanbul between 1869 and 1873, was forced to fight against the reaction of the Amira and the Church hierarchy against what was considered to be his "excessive" zeal to ameliorate the situation of the Armenian peasants of Anatolia.<sup>14</sup>

But the great chasm is not between Istanbul and the Caucasus. It is between Istanbul and the Armenian peasantry of Eastern Anatolia (i.e. Western Armenia). The Armenians do not form a majority in the *Vilayât-ı Sitte* (the Six Provinces already mentioned). The absolute number of Armenians living in this region is in fact a matter of great controversy. There are great differences between the censuses

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13 Thanks to the work of this religious order, the first Armenian dictionary was published in Venice between 1749 and 1769, much earlier than similar dictionaries in many Western European languages. (Panossian, op. cit., pp. 101-109).

14 Panossian, op. cit., p. 174n.

taken by the Church and those taken by the Ottoman state. But even those sources that cite the highest figures for the Armenian population do not claim the existence of a higher Armenian population relative to the Muslim population made up of the Turks and the Kurds (and, after their great exodus of 1864 from Russia, of the Circassians). The Armenians are a minority all around relative to the Muslim population, but they form a plurality. Within this population, beyond the merchant, the clergy, the artisan, and other petty-bourgeois elements, it is the peasantry that is the greatest majority. This peasantry is very much Ottoman, in a very fundamental sense. Apart from the broken Armenian they use during mass on Sunday, these peasants communicate in Turkish. But under the force of immensely oppressive condition they face in the last third of the 19<sup>th</sup> century, they gradually turn to nationalism as a defence mechanism.

It is vital to understand the factors at play here. Before the Reform Firman (the *Islahat* Firman) of 1856, the Armenian peasant, just like the rest of the non-Muslim population of the empire, used to pay a head tax called *cizye* in addition to the regular tax it paid along with the Muslim *reaya*. Since the Reform Firman of 1839 (the *Tanzimat*), as well as that of 1856 (the *Islahat* Firman), stipulated formal equality between the Muslim and the non-Muslim, the *cizye* was repealed. But because the non-Muslims were not eligible for military draft, they started to pay a tax in lieu of military service.<sup>15</sup> However, the question went farther than this additional tax. In the last third of the 19<sup>th</sup> century, the Armenian peasantry started to live as if it were liable to a regime of double taxation.

The fact that due to the financial crisis of the Ottoman state, in this period tax farming had become more and more cruel already implied that exploitation reached new heights. But even more important was the pillage on the Armenian peasants exercised by the chiefs of the Kurdish tribes as well as the begs (*beyler*) of the Circassians who had fled Russian massacres and come to Anatolia, some of whom had been settled in the *Vilayât-ı Sitte*. This made life unbearable for the Armenian peasant.<sup>16</sup> All the petitioning done by the latter was almost invariably ignored. (We will have occasion to mention below that especially after 1878 this became official state policy.) This was a matter of double exploitation. It is crystal clear that the Armenian peasantry is being super-oppressed by being pushed to the lowest rung of the class hierarchy simply because he happened to be a Christian subject of the Sultan. On top of the extraction of the surplus of the peasant by the tax farmers of the absolutist, yet semi-colonial, Ottoman state, with an augmented intensity, came the pillage of the Kurdish tribal chiefs and the Circassian clan (*oymak*) begs, leaders of peoples who still lived under pre-capitalist relations of production, some still surviving as nomadic marauders. There was no other way left for the Armenian peasant but to defend himself qua Armenian since this was precisely what lay at the basis of his super-oppression.

One has to be blind not to see that here national belonging in this instance owes

<sup>15</sup> When, in the wake of the 1908 revolution, military service was extended to the non-Muslim population, all additional forms of taxation on them were eliminated.

<sup>16</sup> It should be remembered that the so-called Debt Administration, a sign of the bankruptcy of the public finance of the Ottomans, was established in 1881.

its entire *raison d'être* to the laws of class struggle. In Western Armenia, ***Armenian nationalism is self-defence action on the part of the Armenian peasantry***. Two of the elements that true Armenian nationalism regards as indispensable elements of the Armenian nation do not even exist here! The Armenian peasant speaks not Armenian but Turkish and, because he is (and *a fortiori* she is) illiterate, the unique alphabet of the Armenian language does not even make its presence felt to his or her consciousness!

Hence, taken as a whole, it might be said that at least three different attitudes had now crystallised within the ranks of the Armenian people. The Istanbul community, under the domination of the Amira class stood against the rise of nationalism within the community. Within the rising bourgeoisie and proletariat in the Caucasus a cultural and political brand of nationalism, at times blended with socialism in the case of the proletariat, as we will see in a moment, was taking form. Finally, Armenian nationalism among the Anatolian Armenian peasantry, nationalism was becoming a survival strategy.

## **2. The Armenian revolutionary movement: nationalism and socialism**

Interestingly enough, the leadership of the self-defence action of the Western Armenian peasantry was provided by political movements from Eastern Armenia. Having received their political education from Russian narodnism (populism) and to a certain extent also from Russian Marxism, the bourgeois and petty-bourgeois intellectuals of Eastern Armenia organised to be the saviours of the Western Armenian peasants. As is well-known, a revolutionary ebullition arose in Czarist Russia from the 1860s on. The revolutionary movement first organised within a populist (Narodnik) current on the basis of the slogan “go to the people”, a current that also had recourse to individual terrorism. This current would give rise to a powerful political party called the Socialist Revolutionaries (abbreviated as the SRs) in the late 19<sup>th</sup> and early 20<sup>th</sup> centuries. Marxism also took its first steps in Russia from the 1880s on. The Russian Social Democratic Labour Party (RSDLP), out of which the Bolshevik Party led by Lenin would somewhat later emerge, was to be founded at the turn of the century.

The Armenian revolutionary movement was formed to a great extent under the influence of the Russian one.<sup>17</sup> This is a movement in which narodnism and Marxism, nationalism and socialism co-existed in uneasy fashion, of which one or the other came to dominate in different epochs and different organisations. As a matter of fact, the first Armenian party that was founded was Armenakan, a liberal bourgeois party whose foundations were laid in Van, a province that was part of the *Vilayât-ı Sitte*, in 1885. This was followed by the establishment of the Hunchak (or Hunchakian) Party in 1886 in Geneva. The Dashnak (or Dashnaksutun) Party,

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<sup>17</sup> The major source in Turkish on the Armenian revolutionary movement is the following: Anaide Ter-Minassian, *Ermeni Devrimci Hareketinde Milliyetçilik ve Sosyalizm 1887-1912* [Nationalism and Socialism in the Armenian Revolutionary Movement 1887-1912], tr. Mete Tunçay, Istanbul: İletişim, 2012.

which could well be regarded as the strongest and the most durable Armenian political party and whose full name is the Armenian Revolutionary Federation, was started in Eastern Armenia in 1890. It would be interesting to compare these dates with that of the birth of the Young Turk movement. The Committee of Union and Progress (the CUP, although that was not the original name the movement donned itself) was established in 1889, almost coinciding with the foundation of the Armenian parties. However, socialism had almost no influence on this Turkish revolutionary movement, as opposed to the Armenian parties.

Leaving aside Armenakan, which had no penchant at all towards Marxism, we can say that the Hunchak was closer to the ideology of Marxism while the Dashnak felt stronger affinity to narodnism. But this difference is relative. Moreover, it must be remembered that the Hunchak, despite leading some important struggles in the 1890s, lost much influence in the early 20<sup>th</sup> century under the weight of its own internal contradictions and it was the Dashnak that took the upper hand within the Armenian revolutionary movement. We can thus reach the following conclusion: Overall, the Armenian revolutionary movement was a kind of peasant socialism for which the national liberation question of the Armenian people held primacy. This general characterisation should not mask the fact that at times (for instance in its 1907 programme) the Dashnak came very close to Marxism, highlighted the class aspect of the struggle, and emphasised the idea that the gist of the matter lies in the emancipation of workers and toilers of no matter which nation from exploitation. Those who, under the hold of Turkish nationalism, strive to depict the Dashnak as a terrorist movement blinded by its hostility to the Turks hide from view not only the sensitivity of the Dashnak to class struggle, but also its collaboration with the Young Turk movement both before and immediately after the 1908 revolution, thus posing as a model to organisations of oppressed nations with a priority emphasis on national liberation in terms of revolutionary strategy. Going even further, one should point out that the Dashnak joined hands with the Bolsheviks and the left SRs during the Baku Commune of 1918, the first victory of the October revolution in the Caucasus region. It is true that in the end, spurred on by the threat posed by the Turkish army, it made the great mistake of taking refuge under the protection of British imperialism and thus caused the Commune to collapse. But for several months at least it strove for the setting up of Soviet power in the region. This is the point of rupture during which the transition from a revolutionary to a counter-revolutionary character for Dashnak was brought about. It will in time become the party of the bourgeois class of the Armenian diaspora on a progressive scale and raise the banner of an anti-Soviet counter-revolutionary orientation. The history of the Dashnak is sharply divided between a revolutionary and a counter-revolutionary politics before and after the Baku Commune.

At the basis of these oscillations lies the fact that the Armenian socialist movement in general and the Dashnak in particular are each marked deeply by peasant socialism or, in even starker terms, petty-bourgeois socialism. The impact of proletarian socialism was restricted among the Armenian people. The Marxist movement grew by leaps and bounds in Czarist Russia in the early 20<sup>th</sup> century, but unfortunately this influence was not felt to the same degree within the ranks of the

Armenian people. The so-called “specifist” current, built entirely on the basis of Marxist ideas, remained extremely weak.

Bolshevism, for its part, was not able to penetrate any sections of Armenian society apart from the petroleum proletariat in Baku. In this latter enterprise the pride of place goes to Stepan Shaumian and his comrades. On the other hand, in Tbilisi, where the Armenian proletariat also made its presence felt, it was the other wing of the RSDLP, the Mensheviks, who had the upper hand. As for the population of Yerevan and its hinterland, they had the tendency to emphasise on the whole the suffering of their peasant brethren of Western Armenia rather than questions of establishing socialist power.

We are of the opinion that the Bolshevik Party made a mistake by approaching the Armenian question in a manner that sidelined the national question, an approach that was ironically marked by the kind of abstract internationalism adopted by Rosa Luxemburg and not at all consonant with Lenin’s keen eye for national oppression in every concrete situation. There was probably a very rightful reason for this: the Armenian question had been instrumentalised by imperialism and, in particular, the Czarist administration up until the Great War broke out. However, when we observe to what extent the national contradiction between Turkish *cum* Azerbaijani nationalism, on the one hand, and Armenian nationalism, on the other, shaped historical developments so dramatically across a vast region that extended from Istanbul all the way to Yerevan and Baku, it becomes an inescapable task, with the advantage of hindsight, to ask the question of whether or not the Bolsheviks could have adopted a different policy on this question. Moreover, this is no matter of a distant past. This fact becomes obvious as soon as one remembers the bloodshed over Nagorno Karabakh in this new century. Immediately on the heels of the most delicate national question of Anatolia and Mesopotamia that is the Kurdish question, the most entrenched national question of this region is the Armenian/Turkish and Armenian/Kurdish combination. It is true that there is Georgia and its contradictions with the Abkhaz and the Ossets, as well as Russian interference in these contradictions. But the most explosive one is the Turkish/Armenian question. We will return to the Bolsheviks’ policy in the early 20<sup>th</sup> century and try to draw lessons for the future.

At this stage we wish to broaden our view and dwell on another aspect of the development of socialism within Ottoman territory. Petty-bourgeois in character though it may be, the sheer fact of its being a socialist movement made it possible for the Armenian movement to contribute to the struggles of the working class and the spread of socialist ideas in the empire as a whole. Armenian socialist members of parliament elected in the aftermath of the revolution of 1908 presented draft laws addressing certain working class demands (strikes, working hours etc.) and, uncowed by their being members of a minority population, stood their ground against the conservative majority of deputies on both immediate questions of bread and butter and, in the background to all of this, on the issue of socialism. It is often said on the left that socialists entered parliament for the first time in 1965, when the Workers’ Party of Turkey (WPT) had 15 members elected, but this is nothing but the mimicking on the left of those historians regarding Ottoman history through an

exclusively Turkish lens and thus impoverishing the experience of socialism in this country.

Even though very little material has seen the light of day so far, the parliamentary minutes show clearly that the Armenian socialist MPs of the time waged a struggle as resolute as the WPT representatives after 1965 and that, moreover, they were confronted by the same kind of aggression and repression on the part of the parliamentary majority of deputies.<sup>18</sup>

To read Ottoman history through the reductionist and impoverishing Turkish lens results in a misconception regarding both the history of bourgeois revolution in Turkey and the history of the development of the socialist movement in this country. We will return to the former, i.e. the part played by the non-Turkish communities living under the empire in the bourgeois-revolutionary movement in Turkey below. As we have already talked extensively on the socialist movement so far, let us make an additional observation. The socialist movement in Turkey was first launched by non-Muslims. Not only Armenians, but also Bulgarians, Jews, Greeks of Anatolia and Greeks of Salonica contributed very largely to the development of socialism in Turkey proper. There are four organisations that are founded on Ottoman territory that are members of the Second International, to whose foundation Engels contributed and of which Lenin and Trotsky, Rosa Luxemburg and Karl Liebknecht, and their parties, as well as many other revolutionary Marxists were members.

Alongside Hunchak and Dahsnak are members of the International the Salonica Workers' Federation<sup>19</sup> and the *Tetebbuat-ı İçtimaiyye Cemiyeti* (Association for the Study of Society) organised by the Greeks of Istanbul. Apart from these, the so-called Inner Macedonia Revolutionary Organisation, whose struggle played a great part in the 1908 revolution as well as the Macedonian insurrection of 1903, was in essence under the influence of both the so-called "Narrow" and "Broad" fractions of the Bulgarian Social Democratic Labour Party. So, Armenians (Hunchak and Dashnak), Jews and Greeks (the Salonica Socialist Federation), Bulgarians (Macedonia), and the Greeks of Istanbul (Study of Society) all organised within the socialist movement.<sup>20</sup>

Why is this important? To ignore the existence of these socialist foci implies an oversight that leaves the alternative to the Turkish nationalism that will flourish from 1913 on in the CUP movement in the form of deportation and genocide of Armenians in the dark, although this is an alternative that is very real. On the banners of all these organisations that have been mentioned is written the watchword "Federation"!

18 Dr. Fethi Tevetoglu, *Türkiye'de Sosyalist ve Komünist Faâliyetler* [Socialist and Communist Activities in Turkey], Ankara, 1967 [publisher unnamed], pp. 34-54.

19 The main source on this topic is: Georges Haupt/Paul Dumont (eds.), *Osmanlı İmparatorluğu'nda Sosyalist Hareketler* [Socialist Movements in the Ottoman Empire], tr. Tuğrul Artunkal, Istanbul: Gözlem Yayınları, 1977.

20 The major source of information regarding all these movements and organisations is: Mete Tunçay/Erik Jan Zürcher (eds.), *Osmanlı İmparatorluğu'nda Sosyalizm ve Milliyetçilik (1876-1923)* [Socialism and Nationalism in the Ottoman Empire], tr. Mete Tunçay, 5th ed., Istanbul: İletişim Yayınları, 2010.

The Salonica Socialist Federation<sup>21</sup> and the Inner Macedonia Revolutionary Movement<sup>22</sup> defended a Balkans federation while the Hunchak and the Dashnak advocated federation or other forms of decentralisation in Anatolia itself. The claim that the Dashnak was a separatist organisation before 1915 is an utter lie! (One has to take a more nuanced view of the Hunchak perhaps.) The Dashnak's programme is reminiscent of Abdullah Ocalan's current programme of "local self-government", which implies the abandonment of his earlier deep-seated separatism in favour of a model fashioned after the European Charter of Local Self-Government of the Council of Europe.

Secondly, even after 1915, the Armenian people provided a very high number of cadres to the Turkish revolutionary and socialist movement out of any proportion relative to the size of the Armenian population that remained in contemporary Turkey in the wake of the genocide. The Armenians that were active in the historic Communist Party of Turkey (no relation to the current party of the same name), those who took part in the Maoist movements of the 1970s, and some of the leading cadres of Turkish Trotskyism to this day are testimony to the resilience of the early engagement of the Armenian people with socialism. In short, the Armenian community of Turkey has been a fountain that nourished socialism and the proletarian movement in Turkey from the late 19<sup>th</sup> to the early 21<sup>st</sup> centuries!

### **3. The despot and the tribe**

Those left-wing liberals who debase and demean the 1908 revolution, the first revolution that took place on Anatolian soil in the modern period (at the level of the entire Ottoman territory, the first revolution was, of course, the Greek revolution of 1821), certainly find the most incontrovertible evidence for this act of denigration in the 1915 genocide. Later on, we shall have occasion to show that a much more nuanced assessment of the relationship between these two historic events is in order than that assumed by liberal clichés. At this point, we need to touch upon briefly the prehistory of the genocide. The liberal camp at times broadens its attack on the revolution of 1908 to even a defence put up on behalf of the despot of the late 19<sup>th</sup> century, the "Red Sultan" of bloody hands in the European imaginary, Abdulhamid II. That is yet another reason for us to take a look at his reign. Dwelling upon that period will also offer us the possibility of taking a first glance at the early formation of Turkish nationalism, something we have already done for the Armenians.

All throughout his reign (1876-1909), his policy in the area we are dealing with in this article can plainly be depicted in the following manner: open up the channels to allow the Kurdish tribe to assault the Armenian peasantry with a view to grasp a part of their surplus product, this whole strategy aiming for the rebinding of the Kurdish

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21 See "Osmanlı Sosyalistlerinin Balkan Federasyonu Çağrısı" [Call for a Balkan Federation by Ottoman Socialists], *Gerçek*, October 2012. See further Haupt/Dumont, op. cit., p. 134.

22 This idea is very influential among socialists in this period and, in particular, among Macedonian revolutionaries. See, for instance, *Une confédération orientale comme solution de la question d'orient* [An Eastern Confederation as the Solution to the Eastern Question], Paris: Plon-Nourrit & Cie, 1905. I would like to take this opportunity to thank Ragıp Zarakolu for bringing this rare book to my attention.

tribes, which had started to rise in revolt against the Sultan's power since early 19<sup>th</sup> century, to the Ottoman socio-economic and political order at this end of that same century. As was already mentioned, the Kurdish tribal chiefs, in their capacity as a pre-capitalist ruling class, had already started marauding the Armenian peasantry's surplus product from the 1860s on. This, we have pointed out, led the Armenian peasantry to take refuge in Armenian nationalism as its only route of salvation.

Naturally, this conflict was exploited by the so-called Great Powers who now were looking forward to an eventual dividing up of the greater part of the territory of this "Sick Man of Europe". As the *Soviet Encyclopaedia* of 1926 summarised very aptly, the "Armenian question" displayed two dimensions:

In its external aspect, one sees the weakening of Turkey by the Great Powers by supporting centrifugal forces within Turkey and thus rendering the country much more amenable to colonisation. In its domestic aspect, this issue takes the form of the self-determination of the Armenian nation under the leadership of the Armenian bourgeoisie and consequently in line with the interests of this same bourgeoisie.<sup>23</sup>

We cannot go along the excessive emphasis on the importance of the Armenian bourgeoisie, but the characterisation of the question by pointing to its differential manifestation externally and domestically is quite correct. Once the intervention of foreign powers started, Abdulhamid naturally could not yield to demands for democratic reforms from the point of view of the security and stability of the absolutist state. In place of this he carried the situation one step forward. He created a military force that would render the repression and the exploitation the tribes exercised upon the Armenian peasantry a durable one: this was called the "Hamidiye Regiments". This military force established in 1890 engaged in an unceasing series of massacres against the Armenians between 1894-1896. Although an exact figure cannot be provided, there are claims of up to 300 thousand victims for these years. It is clear that the nickname the "Red Sultan" attributed to Abdulhamid derives from these atrocities committed against the Armenian peasantry. This is the monster on which some left-wing liberals heap praise, even if occasionally.

The significance of the 1894-1896 massacres is two-fold. First, they reveal unambiguously the part played by the Kurds in the cleansing of the Armenians from Anatolian soil. Below, we will also be looking at the manner in which Kurdish tribes engaged in collaboration and complicity on this score with Turkish official forces and later with the cadres that represented the bourgeois revolution.

Secondly, the Abdulhamid atrocities became later the basis for a debate on whether there was a continuity between the 1894-1896 massacres and the 1915 genocide. In our opinion, these two historic events share a common point (and are linked with by an intermediary link in the 1909 Adana atrocities): the repression and annihilation of the Armenians on the basis of atrocities that bring together the

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<sup>23</sup> Mehmet Perinçek, *Rus Devlet Arşivlerinden 150 Belgede Ermeni Meselesi* [The Armenian Question in 150 Documents from the Russian State Archives], Enlarged edition, İstanbul: Kırmızı Kedi Yayınevi, 2012, p. 29. It should be recalled that we are dealing with back translation here.

Turkish and Kurdish ruling classes.

However, the differences between 1894-1896 and 1915 are of greater weight. First, although the Abdulhamid massacres dealt an extremely heavy blow to the Armenian peasantry, there are no signs that suggest that there was an intention to extirpate the Armenians from Anatolian soil. In other words, there is no historic evidence that shows that there was the aim of creating a “final solution”, which was indubitably a clear objective in the 1915 genocide. Secondly, and related to this, the atrocities were committed exclusively in the *Vilayât-ı Sitte*. In contrast to the genocide of 1915, there were no such activities organised in Central or Western Anatolia. Thirdly, and historically speaking perhaps most importantly, there are no indications that there was an intent to dispossess the Armenian masses completely and systematically. As we shall see, the 1915 legislation on so-called “Abandoned Property” will aim precisely at this. Why do we say that historically speaking this last element is the most important? Because this clearly shows that the Abdulhamid atrocities were not a final reckoning between the two major (Armenian and Muslim-Turkish) wings of the rising bourgeoisie on Anatolian soil, but simply a struggle to death between the sedentary peasantry of the *Vilayât-ı Sitte* that happened to be Armenian and the pre-capitalist tribes roaming the same region that happened to be Kurdish.

### 4. Imperialism and national liberation

In the saga of the Armenian national liberation movement that lasted close to half a century, which started with the first commotions of the 1860s, gained traction in the wake of the Hagia Stephanos and Berlin Treaties of 1878, organised people’s rebellions in the 1890s and ended in the disaster of 1915, relations with imperialism are of primary consequence. The place reserved for the Great Powers by the Armenian national movement in its overall strategy and the consequences that flowed from this offer invaluable lessons to national liberation movements in all parts of the world, but especially in our own region.

We already indicated above that despite the existence of a certain rapport to Marxism as well, Armenian revolutionary parties were truly organisations of petty-bourgeois (peasant) nature under the influence of Russian narodnism. A further effect of the Russian Narodnik movement on the Armenian parties was their adoption of individual terrorism as a method of political struggle. This kind of action usually creates in the masses the impression that they are face to face with an extremely radical organisation. But many organisations that have recourse to terrorist methods do so with the ultimate aim of forcing the ruling class to admit them into the existing socio-political order. This is true for the Armenian parties as well.

All sources concur on the fact that the Armenian parties carried out terroristic actions in order to draw the attention of European powers to the Armenian question and that for them the effort to convince the Great Powers to apply pressure on the Ottoman government in their favour was of **strategic** value. This approach certainly corresponded with certain aspects of the real situation on the field. All the European states, starting with Russia, had been busy for some time now putting to use the

national grievances and demands of both the Balkan peoples and the Armenians in order to put the Ottoman state in a difficult position, to wrest concessions from it, to cut the ties of these oppressed peoples with the Ottomans and bring them under their own control, and, in the extreme case, to bring down the entire Ottoman state. The empire had already lost its control over some Balkan peoples in a succession of insurrections, revolutions, and wars of independence (Greece 1821-1829 and Serbia 1834-35). Bulgaria had become an autonomous state, though not completely independent, in 1878. The *Tanzimat* and *Islahat* Firmans of 1839 and 1856 respectively were the product of the immense pressure on the part of the European powers to force the Ottoman state to grant equal rights for its non-Muslim subjects. Greece had received a generalised kind of support, but regarding the Slavic peoples of the Balkans (the Serbs and the Croats and the Bulgarians and the Macedonians etc.), it was Czarist Russia that was at the forefront of the lot.

And the Czars eyed not only the Balkans to the west and Western Armenia to the east. The most important prize for them would be the Straits, i.e. the Bosphorus and the Dardanelles, paths to warmer seas. So, concerning Russia it was almost clear that it was the full destruction of the Ottoman state that was on the agenda. It was in order to prevent Russia from achieving this objective that during the Crimean War of 1853-1856 Britain and France joined hands with the Ottomans. Britain was, so far, trying to protect the unity of the Ottoman state not only against the Russian Czar but against all powers. The main motif here was to prevent any great power to gain control over the route to India, the crown of the British empire.

Russia made its most radical move during the 1877-1878 war. As a result, the Ottomans had to concede a certain measure of European supervision not only over the Balkans but as well over Armenia in Eastern Anatolia. Article 61 of the Berlin Treaty (1878) did impose significant restrictions on Russian interests relative to the provisions of the Hagia Stephanos Treaty that was signed between Russia and the Ottomans immediately before it, but at the same time it transformed the Armenian question into an object of international law. From then on, the Armenian question was going to revolve around the application of the international oversight stipulated by this Article 61. The appointment of foreign observers to the *Vilayât-ı Sitte* region will become a central bone of contention. Two supervisors will finally be appointed, but before they could take over their mission the Great War will break out and genocide will win the day.

The question that has to be posed now is the following: how was it possible that, although the protection of their rights became a duty and a priority for the European Concert of states, the Armenians were subjected within the four decades that followed upon the heels of the Berlin Treaty (1878) to two major (1894-96 and 1915) and one local (Adana 1909) massacres? The answer is two-fold. First, the aims that imperialist states adopt for the short run may very well become obsolete when the overall interests of the states in question change in the medium and long terms. In effect, it is because the overall policies of each of these states have changed during the decade of the 1890s that the Armenians were left alone to face their predicament. As for 1915, it is now the time of the world war and many European states (the Allies) are already at war with the Ottomans, but wartime facilitates such

massacres.

Secondly, some of the imperialist states were bound to the Ottoman state through a web of interests of a strategic nature. Wilhelmine Germany found itself precisely in this predicament. As we will later on delve deeper into this aspect of the question, we make do with simply indicating this at this stage. Let us only mention this: in both major massacres, whether under Abdulhamid II or under the CUP government during the war, the policy pursued by Germany tremendously comforted the Ottomans.

Having conceived of the pressure of the imperialist states on the Ottomans as an instrument of *strategic* value for gaining Armenian national rights, the Armenian revolutionary movement thus led its own people to a quandary that resulted in hundreds of thousands, even millions of deaths and the definitive extirpation of the Armenians of Western Armenia from their age-old home. This aspect of the question is often overlooked. It is, however, a lesson of immense value for all national liberation struggles. Laying the hopes of oppressed nations in the intervention of imperialist powers is usually defended in the name of “realism”. Those who stand up against this are accused of rigid defence of principles where tactical flexibility is required. The century-long experience of two peoples in the combined regions of Anatolia, Mesopotamia, and the Caucasus presents important lessons on this score.

During the Great War, the Palestinians, as well as their Arab brethren in other regions, harboured the dream of freedom from Ottoman yoke under British protection. Today, more than a century later, the Palestinians still suffer immensely under colonial rule. They are, in fact, now being subjected to the same predicament as the Armenians a century ago. Genocide is once again on the order of the day. As for the Armenians, the political forces of this oppressed nation decided to tie the fate of the liberation struggle to the caprices of imperialist states. In the end their people were subjected to a genocide in front of the eyes of the entire world. One hundred ten years later, the “rules-based” and “democratic” system of Western imperialism has still not been able to incontrovertibly register that what they suffered was a genocide. So, this is what is called a “realistic strategy”! Beware oppressed peoples of the 21<sup>st</sup> century. *De te fabula narratur!*

## 5. Bourgeois revolution and the question of nationalities

The 1908 revolution, the first to occur on what is now the territory of the Turkish republic, differed from the following one, the 1918-1923 revolution, both by the participation to the end of the great masses of the people in the revolution and by its multinational character. Many incidents experienced in Anatolia and the Balkans from 1904-1905 on, ranging from tax revolts to mutinies in military barracks, clearly indicated that the small merchants and the peasantry were in a very restive mood. After the victory of the revolution on 24 July 1908, a strike wave of a scale not to be seen again for the next half century took all big cities in its grip and demonstrated that the working class was an integral part of the revolution.

As for the multinational character of the revolution: the denomination “Young Turk” is decidedly inappropriate for this revolution since it attributes the revolution

solely, or at least primarily, to the Turks. But this is patently untrue. The insurrection of 1908 can, in fact, be considered a continuation of the insurrection organised by the Macedonian revolutionary movement in 1903. It is also a product of the actions of the Armenian revolutionary movements against Abdulhamid II. The Turkish heroes of the revolution (Enver and Niyazi Begs) were in fact military officers sent by the Sultan's government to quell the Macedonian guerilla war after the 1903 insurrection, but turned their weapons against the Sultan, a fine instance of Lenin's "revolutionary defeatism" *avant la lettre*.

The 1908 revolution can best be designated by the concept of "Liberty" that it used frequently to describe itself: the "Freedom Revolution" is how we call it. This name is also pertinent for another reason: the 1908 revolution paved the way towards a fraternisation among the nations of the empire, if only for a few years, and the efforts to build a more democratic future in the country in unity. On 24 July, the Turkish heroes of the revolution, Enver and Niyazi, embraced the Macedonian revolutionaries they had been chasing on mountain tops only a few months ago. The CUP struggled hand in hand with the Hunchak and the Dashnak against the despotic regime of Abdulhamid II. There were Macedonians and Bulgarians within the so-called Action Army that rushed from Salonica to Istanbul on 31 March 1909, when a counter-revolutionary uprising threatened to overthrow the gains of the revolution.

Let us try to explain briefly the import of the contribution made to the 1908 revolution by the Armenian revolutionary movement over the years. The first move of the Armenian revolutionary movement resulted in a series of revolts between 1894 and 1897 that spread over different regions and shook the socio-political order. It was first the Sasun Armenians that rose in rebellion (the reader is asked to remember the explanation we have already provided with respect to the plight of the Armenian peasant). The Hunchak played a serious part in this insurrection. It is an established historical fact that the Macedonian revolution that started one year after the Sasun rebellion was inspired by the latter (despite the immense distance that separates the two geographic locations). The Macedonian revolution, during which an entire people rose up, in contrast to the Sasun rebellion, which remained a local affair, started as a guerilla war.

In 1895, in the predominantly Armenian neighbourhood of Kumkapi in Istanbul, thousands of Armenians gathered for a peaceful protest against the ongoing massacre of Armenians in Eastern Turkey (Western Armenia). But even before the march set out, they were mowed down by the "security forces". It needs to be stressed that this crowd was composed not of the members of the bourgeoisie and the petty-bourgeoisie of the Istanbul Armenian community, marked as these were by the complacency of the Amira culture of the capital, but of Armenian porters, boat rowers, and other poor strata of the population that had fled the massacres in the east and taken refuge in Istanbul, a historic precedent, one would say to the Kurdish migrant population of Istanbul in our times!

The 1896-1897, the Cretan insurrection made a great contribution to this revolutionary wave. In the same year of 1896, the Armenians of Zeytun in the Southeast of Turkey (near today's city of Kahramanmaraş) rose up.

Overall, we have not had the opportunity to look into this series of revolts and

insurrections sufficiently, so we will make do with a provisional judgment: The period 1894-1897 is the first widespread wave of bourgeois revolutionary commotion in the Ottoman state specifically on the territory of what is now Turkey.<sup>24</sup> If this is true, then the 1894-1896 massacres perpetrated by Abdulhamid II, making use of the Hamidiye Regiments, are tantamount to a counter-revolutionary operation. We repeat that we advance this idea as a provisional hypothesis. If this is true, then this is another aspect that distinguishes the 1894-1896 massacre from the 1915 genocide for in the latter case there can be no talk of a revolutionary upsurge.

In all the Armenian episodes of the revolutionary wave of 1894-1897, the leadership of the Hunchak is the rule. The only exception to the rule is the raid on the Ottoman Bank in the business district of Istanbul in 1896. The Ottoman Bank was established by French banking capital with a view to function as the central bank of the Ottoman state. The headquarters of the bank in the neighbourhood still named Galata was raided by a Dashnak commando and after a lengthy occupation of the building the militants were promised safe conduct to go abroad in return for lifting the occupation. The Ottoman Bank raid was the only move that had the character of a purportedly heroic vanguard operation divorced from the masses during the great wave of struggle of the Armenians. Its objective was, as we explained earlier, precisely to draw European attention to the Armenian question. It may of course be said that this is very much comprehensible, given the fact that when the raid was carried out, hundreds of thousands of Armenians had fallen victim to the atrocities of the Hamidiye Regiments in the space of two years' time. Any revolutionary may, under such circumstances, resort to what seems to be hopeless acts of vengeance and retribution. But the problem lies not in the action but in the *aim* of that action: the petitioning of imperialist powers.

The second revolutionary wave extended from 1903 to 1908. Within this wave may be found the transformation of the Macedonian revolution from a guerrilla movement into a mass popular revolution, the continuation of the guerrilla movement when the popular revolution was arrested by the violent reaction of the Ottoman army, the organisation of tax revolts in the Balkans, Anatolia, even in the Arab geography, widespread unrest and mutinies in military units, and the turning of the weapons of the Sultan's army against him in 1908. The Armenian movement is conspicuous by its absence in this second wave. It seems that the massacre of 1894-1896 had taken its toll on the Armenians of Turkey. The sole remarkable Armenian action of this period worth mentioning is a spectacular attempted assassination of Abdulhamid II by Dashnak militants in 1905. The bomb they planted went off with a delay and Abdulhamid came out unscathed.

Let us remind the reader of the experience of the Ulyanov family, the family of

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24 Then there is a wave of rebellions between 1860 and 1862. During this interval, there was a revolt on the part of the Maronites of Lebanon, who won as a result a special status thanks to the intervention of Napoléon III, the dictator of France. To this was added the rebellion of the Armenians of Zeytun in 1861-1862. Moreover, in the same period, there was a very tense situation in Montenegro and Bosnia-Herzegovina in the Balkans. We tend to think that this early wave should be considered the revolt of the minorities and that the conditions of bourgeois revolutionary insurrections had not yet gathered.

Vladimir Ilitch Lenin in his youth, when his elder brother, a Narodnik militant, failed to kill the Czar during an attempted assassination and himself lost his life in retribution. The reader is asked to remember our assessment of the Armenian revolutionary movement as very much influenced by the Russian Narodnik movement.

There is another aspect to this episode. Should such an attempt at assassination occur today, there would be an entire chorus of critics across the entire bourgeois political spectrum, competing with each other in condemning the would-be assassin. However, Tevfik Fikret, the most advanced poet of bourgeois revolutionary sensibility in Turkish history and a trenchant critic of the despotism of Abdulhamid II, wrote a poem addressing the would-be assassin as “you, glorious hunter” and mourned the fact that the “hunter” was not able to shoot down his victim. This is startling testimony to the powerful hegemony of the revolutionary atmosphere that roamed the country at that moment.

This empathy between the different actors of the revolutionary upsurge found its counterpart in the holding of party congresses in common between the revolutionaries of the different nationalities (most strikingly between the CUP and the Armenian parties), who would be converted into the executioner and the victim in the space of less than a decade. Such are the contradictions of the “Freedom Revolution”.

Considered in its totality, the situation created by the 1908 revolution is one of an explosion of freedom. Numerous parties, associations, newspapers, and magazines are born. As already mentioned, a strike wave erupted, the like of which was only to be seen in the 1960s. People filled the streets of even small Anatolian and Balkans towns chanting “Hürriyet! Hürriyet!” (“Freedom! Freedom!”). In December Parliament, which had been shut down three decades ago, is convened. An air of freedom roams the country from one end to the other. The new regime is multinational in all dimensions. The imam, the priest, and the rabbi all take their place in the midst and often in the forefront of the crowds celebrating the victory of the revolution as representatives of the “millets”. Guerrillas imprisoned are immediately released.

In this context, the composition of the first parliament that was elected after the revolution has special significance. Of the new Members of Parliament, 142 are Turks (Kurds were, at that time, thus designated as well, no breakdown was made in the literature between the two), but there were also 60 Arabs, 25 Albanians, 23 Greeks (denominated “Rum” after “Eastern Rome” and not “Yunan”, the term used for the Greeks of Greece), 12 Armenians, 5 Jews, 3 Serbs, and one Vlach. In other words, 142 Turks and 133 non-Turks. The status of Armenian MPs has a special importance from the point of view of the topic of this article.

A complete alliance was established between the CUP, on the one hand, and the Hunchak and the Dashnak, on the other, thanks to the rapprochement embodied in the earlier cooperation between the two sides, given organisational form in the commonly held congresses of 1902 and 1907. Thus, the Armenian MPs were elected on the CUP slate. And if one remembers the character of the Armenian revolutionary movement, among them were socialists. This is how a right-wing author depicts the situation:

The first socialists under the Ottoman Empire were Armenian politicians. One of the two parties that were founded in the Abdulhamid epoch outside the frontiers of the country was socialist, moreover socialist in the Marxist sense of the word. These men, who sought the road to Armenian independence in the light of the ideal of socialism, were in close contact with the opponents of the Czarist regime, all of them Marxists—the Bolsheviks and the Mensheviks—and had turned to socialism under their influence. In the first Constitutional parliament there were also, apart from the Armenian Members of Parliament, socialists, red socialists, among the Bulgarians that were elected on the slate of the “Committee of Union and Progress” and sent to Istanbul... Vlahof, the Bulgarian Member of Parliament from Salonica, was a “real socialist”.<sup>25</sup>

This is quite damning for the unilinear view spread by left-wing liberals about the CUP and the revolution of 1908. They represent the CUP as the tyrannical defender of “Turkism” and yet among their Members of Parliament are Armenians and Bulgarians who are socialists, “red socialists” as this conservative author stresses.

Until the Balkan wars of 1912-1913, the CUP saw Turkey’s future in the form of a modern democracy that would be constructed together with the other “elements” (“milletts” and other ethnicities) of Ottoman society. This is known as the programme of “Ottomanism”. That is the real programme of the Young Turks and of the 1908 revolution. This is diametrically opposed to the orientation of the Abdulhamid regime, based as it was on the repression or even extermination of the Armenians.

It is within this context that the 1909 Adana massacre of Armenians, mentioned earlier, should be reassessed. Adana, a major hub in the southeast of Anatolia, was a city that had avoided the 1894-1896 atrocities thanks to the popular uprising of the Armenian population living in the peripheral neighbourhoods of the city. In 1909, there occurred a massacre in this city quite similar to those that happened under Abdulhamid elsewhere, killing approximately 10 thousand Armenians according to some estimates. Some interpret this massacre as evidence that proves the fact that the Young Turks were enemies of the Armenians almost “congenitally”. However, as even genocide scholars like Vahakn Dadrian admit, Adana was a massacre that was planned so as to upset Young Turk revolutionary power. We have not come across any historical record of those responsible for the murdering of hundreds of thousands of Armenians in the 1894-1896 atrocities. Immediately after the Adana massacre, in contrast, more than a hundred people deemed to be the perpetrators of the killings were tried and executed.<sup>26</sup> It is a fact that in the wake of the Great War some ringleaders of the genocide were condemned to death by an extraordinary court. But, on the one hand, the scale of the massacre was so great as to make it impossible to cover up the crimes committed and, on the other, the political rivals of the CUP were after political vengeance, and even further (and this is the most important aspect), Istanbul was, then, under the rule of imperialist occupation

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25 Tevetoglu, op. cit., p. 35, citing Münir S. Çapanoglu’s book *Türkiye’de Sosyalizm Hareketleri ve Sosyalist Hilmi*.

26 Vahakn Dadrian, *The History of the Armenian Genocide. Ethnic Conflict from the Balkans to Anatolia to the Caucasus*, Providence: Berghahn Books, 1995, pp. 179-184.

forces, who set the pace and direction of the policy to be pursued. It is true that in the case of the Adana proceedings, too, appeasing the Great Powers might have been, and probably was, one of the motives, but this general context of the policy, a constant of Turkey's relations with Western Europe in the modern period, and the circumstances of imperialist military occupation cannot be put on a par.

In short, the Freedom Revolution of 1908 is of a character totally different from, and in certain senses diametrically opposed to, the caricatured version that is put forward at present by the left liberals. There is an aspect of this in the domain of foreign policy. In this first phase of the revolution, the Ottoman state moved away from Germany under Wilhelm II, which had remained entirely silent with regard to the massacres of Abdulhamid II. It started to pursue a policy close to Britain. This entire orientation will suffer a great blow with the onset of the Balkan wars. The Balkan wars created a fear in the *millet-i hâkime* (dominant nation) of the Ottoman lands to the effect that the empire and even the very existence of the state itself came under threat of extinction.

This dealt a mortal blow to the project of marching into the future relying on all the ethnic elements of Ottoman society. It resulted in the Young Turk leadership abandoning the programme of construction of a multinational Ottoman state and adopting a reactionary chauvinistic Turkish nationalism. This is much more important than the fact that the Ottoman state lost an important chunk of its territory in the process. It is a turning point for the CUP and for the relations of the Turkish dominant nation with the rest of the multitude of nations within the empire.

The Balkan wars implied a retrocession of the 1908 revolution, its becoming much more conservative in its orientation and the destruction of its multinational character.

Having started in October 1912, the Balkan wars cast the Ottoman state, a Balkan state *par excellence* for long centuries, out of the peninsula (even losing Edirne/Adrianopolis, which was later retrieved) within the space of nine months. The trauma created thereby for the CUP set in motion a profound transformation within the party. The CUP had been ousted through a coup of another organisation in July 1912, before the onset of the war, but came back in the midst of that same war as a result of the notorious raid on Bâbüali (the Sublime Porte, the seat of government) establishing a new government of their own with guns in their hands.

The entire atmosphere of revolutionary Turkey changed thereby. Two opposing coups within a span of six months, the CUP first ousted, then reconquering power. A nine-month war that ends in a debacle. No more echoes of the atmosphere of "freedom" so rampant in 1908 and no more traces of the free elections held on the heels of the revolution. Even worse is the abandoning of the idea of building a multinational state in favour of an orientation of unalloyed "Turkism". 1913 was the year of the inauguration of the policy of so-called "National Economy". This is the period when a *wholesale programme geared to promoting the Muslim (Turkish) elements of the bourgeoisie to a position superior to the non-Muslim elements (the Greek, Armenian, Jewish, and so-called "Levantine" wings) was applied.*

The idea that war is the continuation of politics by other means is at certain junctions true for domestic politics as well. Having started to promote the interests

of the Muslim fraction of the ruling classes at the cost of the non-Muslim ones before the Great War, the CUP resorted to military methods once the war started, especially in regard to the Armenians. The genocide, starting with the great deportation of 1915 and almost completely eliminating Armenian presence in Anatolia within the space of two years, is directly the result of this policy.

Having initiated a process of building a multinational bourgeois state using relatively democratic methods despite taking up questions pertaining to class only from the point of view of the interests of the bourgeoisie, the Freedom Revolution and its powerful leadership the CUP pursued a reactionary and merciless Turkish-nationalist policy from 1913 to 1918, when its leaders fled to Germany upon the defeat suffered in the Great War. The history of the Freedom Revolution and of the CUP is thus divided into two parts that stand in opposition to each other. In between rises the Balkan war.

The CUP did not lose its bourgeois character in 1913. It is still striving to construct a bourgeois state and develop capitalism on Ottoman territory. In other words, the CUP has not gone to the side of counter-revolution. It has remained on the ground created by the revolution, but has become rigidified and tyrannical. It is still working towards the aims of the revolution but is using reactionary methods to achieve those aims. In political history this has been called a “Thermidor”, a term inspired first by developments during the Great French Revolution. Continuing to work for the aims of the revolution in content, but becoming reactionary in method. The Balkan war was the Thermidor of the Young Turks.

## 6. Ottoman imperialism

*They shot me inside Çanakkale,  
They laid me in a grave all alive.  
From a popular folk song*

If the first condition for understanding the Armenian genocide is to grasp the Thermidor that befell the 1908 revolution, the second condition is to be able to correctly situate the Ottoman state’s position within the Great War. There is a one-to-one, inseparable, organic one would say, relationship between the policy of the CUP in the Great War and the Armenian genocide.

The thinking one finds in the intellectual systems of the Turkish bourgeoisie and of bourgeois socialism has generated a grotesque contradiction. The two wings of both the bourgeoisie and of bourgeois socialism, i.e. Kemalism and liberalism, find themselves in a strange consensus here.

The fact that the Ottoman state became a party to the Great War is lambasted as an adventure initiated by Enver personally or the CUP at large. The defeat suffered in the battle of Sarikamış vis-à-vis the Russian army is condemned in the severest terms. But then the Dardanelles/Gallipoli or “Çanak” war, itself but a battle within a long and bloody war, is elated, declared to be defence of the fatherland, and turned into a national cause. (Let us make a parenthetical remark here by pointing out that we have never encountered a distinctive approach on the part of the liberals towards the Dardanelles affair. We can safely assume that they adopt a neutral

position on this score.) The exaltation with respect to the Dardanelles/Gallipoli campaign is even more marked on the left. According to many prominent writers in this tradition, the victory of the Ottomans against the Allies at Dardanelles implies a progressive leap forward not only domestically, but equally internationally since it has rendered the October revolution in Russia possible.

It is interesting that historical development has brought together in this case the two wings of ideology, i.e. the Kemalist and liberal wings. This is for very different reasons, though, both with respect to their explanations of the country's joining the war and the assessment of the position of the country in the Great War. Kemalism very meticulously distinguishes itself from the CUP precisely on the question of the bankruptcy of the latter in the Great War. During the so-called National Struggle (1918-1923), Mustafa Kemal tried with all his might to keep Enver and his men, waiting in the wings eagerly for a false step on his part so as to grab power, away from the movement in Ankara.

Hence impossible for Kemalists to condone the policy pursued during the Great War. In effect, since the programme Enver strove for was to achieve the survival of the empire while Mustafa Kemal's programme after the defeat in the Great War was one of retrenchment to the heart of Anatolia, it was inescapable that the two projects clash at a certain point. For this reason, Kemalism characterises the entry of Enver into the Great War and his policy therein as "adventurism". This is reflected even in school textbooks.

Turning to liberalism and left-wing liberalism, this current lays the burden of what it conceives as the repressive approach of the state vis-à-vis civil society as the first sin of the CUP leaders. It takes an antagonistic stand against the CUP both in its revolutionary (1908-1913) and in its Thermidorean periods. This is what also determines its attitude concerning the position of the Ottoman state in the Great War (we have already noted that the Dardanelles/Gallipoli campaign stands aside here as a partial exception).

The fact that both liberals on the left and right and the Kemalists lay the responsibility of the participation in the Great War at the door of the CUP and Enver, its leader, due to their antagonistic feelings against the latter is an idealist interpretation of history. It conceals the real relations rather than explaining them. Hence, we must first take up the question of the real dynamic that pushed the Ottoman state to take the side of Wilhelmine Germany and the Axis at large in the Great War.

In fact, in the approach to the Great War, we find a new avatar of the idealist methodology that is used for other phases of Turkish history as well. In this methodology, history is shaped not by class struggles, but by the dynamic of the ideas and sentiments of certain individuals. What is said about Enver or the Triumvirate consisting of Enver, Talat and Cemal, or the CUP at large after a certain stage may not be misplaced. However, these are the concrete forms adopted by contradictions that lie at a deeper level while looking for a solution in their process of becoming.

The participation of the Ottoman state in the Great War and its position within that war were directly a product of the contradictions and the struggles within the bosom of the rising bourgeoisie in the country. The contradiction that marked the last half

century, if not even from the Tanzimat period (1839 on) was a contradiction within the bosom of that class: The rising commercial bourgeoisie in the Ottoman country consisted to a great extent of the Christian and Jewish elements. State power, on the other hand, lay in the hands of the Muslim Turks. The 1908 Freedom Revolution was the last move in unity of the rising bourgeoisie and the educated layers that sided with it. By eliminating in traumatic violence all the hopes of the CUP leadership to hold the “elements” together, the Balkan war (1912-1913) tolled the last hour of Ottomanism. Now the CUP turned to a future for the Ottoman state under the exclusive domination of the Turk and the Muslim and adopted a programme that excluded the Armenian and the Greek. (The Jews sided with the Turkish element, for a host of reasons we need not go into.)

This new orientation towards the non-Muslim “elements”, who in fact still held the greater part of economic power in their hands, aimed at turning over domination in the sphere of capital accumulation to the nascent Muslim-Turkish bourgeoisie through the instrument of state power. This meant that the two currents of Turkism and Islamism were, separately or in combined fashion, going to form the basis of the new orientation. What the CUP sought to achieve during the Great War is this new programme of the Muslim Turkish bourgeoisie.

Neither Turkism nor Islamism were the brainchildren of Enver. Within the new rising fraction of the Turkish ruling classes all the layers, the local notables (*eşraf*), the nascent bourgeoisie, and the educated layers which served the class as their battering ram acted together. Ziya Gökalp, Yusuf Akçura, Gaspıralı İsmail, Ahmet Ağaoğlu, Ömer Seyfettin, Mehmet Emin, all the ideologues contributed to the new constellation. These are the Turkists. Islamism, on the other hand, was represented by the magazine *Sirât-ı Müstakim* under Abdulhamid II and by another magazine, *Sebilürreşad*, under the CUP. There was no Great Wall of China between the two environments.

The participation of the Ottoman state in the Great War was a *fuite en avant* as the French say, an escape towards the future. The “sick man of Europe” was painfully aware that all the Great Powers, i.e. the imperialist countries, were conducting negotiations and waging struggles in order to share out its heritage. The central bank, the public finance, and finally the army of the Ottoman state (and we will shortly come back to this) had been taken over by imperialist powers and the Ottoman state had fallen to the position of a semi-colony (a country that is formally, in other words legally, independent but is in fact beholden to foreign powers. As the dark clouds of war gathered in the horizon, the CUP resolved to remove the Gordian knot by a veritable *fuite en avant*: the solution would be **new conquests!** Turkism turned into the higher form of Panturkism (or the dream of the “Turan”) and Islamism the form of Panislamism. To respond to the collapse with new growth, that was the formula! Did Russia threaten Turkey by abusing the rightful grievances of Christian peoples? Then Turkey would respond in kind and raising the Turkic and Muslim peoples of the Caucasus and Central Asia in rebellion would injure Russia at its Achilles’ heel! In other words, Enver’s programme was to expand towards both Russia’s hinterland and conquer Iran, Afghanistan, and beyond. The use of both Turanism (Panturkism) and Panislamism (since the Ottoman Sultan also claimed to be the Khalif of all

Muslims) was on the order of the day. So, from a defensive posture, the Ottoman state would now move to defend itself through an expansionary policy.

Adventurist this policy was. But it was a product neither of the sickly imagination of Enver, nor of the unwarranted militarism of the CUP. Adventurism is one thing, daydreaming is another. This strategic orientation did have a material basis. This material basis derived from the contradictions that Germany, the rising imperialist power of Europe, harboured, on the one hand, with Britain, the hegemonic power of imperialism now in decline, and, on the other, with Russia, which, despite its ambitions on the Ottoman Empire, had fallen prey to an as yet undiagnosed disease.

Germany wished to grab the colonies of Britain in Asia. As a result of this ambition the Ottoman Empire had become, even before the rule of the CUP, even during the reign of Abdulhamid II, a country on which Germany set eyes. This did not derive solely from the economic advantages the vast empire could offer Germany (for instance the Baghdad railway). The Khalif-Sultan of the Ottoman state was a well-placed ally in order to disrupt the domination of Britain over vast areas of Asia, from India to Egypt. Additionally, the empire under the control of the Turk was the ideal partner in order to entice the Turkic peoples of the Caucasus and of Central Asia and beat Russia on its own turf. Germany and the Ottomans seemed to be born partners in this early age of imperialism. What Enver and his team did was to draw the conclusions of this situation and engage in *cutting the Gordian knot of the Ottoman Empire with Wilhelm II's sword*.

Let us then draw a plain conclusion: the Muslim-Turkish bourgeoisie of the Ottoman state had been hopelessly searching for a way out both in its rivalry with the non-Muslim fractions of the bourgeoisie and in the face of the ambitions of imperialist countries to fragment and gobble up the empire. This bourgeoisie, resting as it was on a weak economic basis, had only one lever: this was the powerful state apparatus that inherited a tradition of six centuries although it seemed to have reached the end of its days. The Great War became the trampoline that was expected to help the Turkish rulers of this state to overcome the threat of fragmentation through recourse to a risky policy of further expansion in other directions at this moment of the repartition of the world by the Great Powers.

If what has been said so far is true, the rest follows logically. Since the Ottoman leadership strove to become a part of the entire attempt at the repartition of the world, then the war waged by the Ottomans becomes *an imperialist war* just as the war is an imperialist war for the other powers! Tremendous irony: a precapitalist colonialist empire that has become a semi-colony itself of the truly imperialist countries is out to wage an imperialist war hand in hand with Wilhelmine Germany!

The Ottoman state is not waging a war of defence or fighting for the defence of the fatherland in World War One. It is participating in the war of repartition of the world hoping to benefit from the pillage of the losers.

If this characterisation of the objective situation of the Ottoman state in the Great War is correct, several conclusions to be drawn from this rip apart certain myths that are harboured in Turkish bourgeois ideology.

The only event of the war on which any ideological legend had not been created until recently was the Sarikamış rout suffered against Russia on the mountains

in the northeast of the country. This is due to the hostility of both Kemalism and liberalism to Enver, who at that stage was the leading figure of the CUP. Almost every source insisted that the army sent to this battle was destroyed in a few days and that 90 thousand soldiers fell victim under the snow and cold of Sarikamiş. If what is depicted as pure adventurism is tied to the *fuite en avant* of the Muslim-Turkish fraction of the Ottoman bourgeoisie when faced with the historic dead-end they faced, this characterisation is *grosso modo* correct. This was the state of things until recently. However, since the dissolution of the Soviet Union an effort to resuscitate Enverism or the CUP at large has been in the air, for reasons that we cannot go into here. This new tendency has engaged in a process of normalisation for Sarikamiş, working for its historical rehabilitation. According to this narrative, Sarikamiş should be seen as defence of the fatherland, a battle in which the “children of the fatherland” fell as martyrs, as much as those who died in the other battles the Ottomans engaged in during the Great War. No one would object to honouring the memory of extremely young people of the poorer strata of society who fell in that war. However, an approach that would hide from the view of the younger generations the fact that these “young children” fell victim to the instinct of pillage on the part of the ruling classes, which would cast a heroic light on Sarikamiş, presenting the tragedy suffered as a catastrophe common to the entire “nation” should be categorically rejected. ***The Sarikamiş battle lacks all credibility and legitimacy.***

We then come to Dardanelles. The spring months of 2025 will see the 110<sup>th</sup> anniversary not only of the Armenian genocide, but that of the Dardanelles/Gallipoli campaign as well. With Dardanelles/Gallipoli we enter the domain of legend. Seeing and presenting this war as the “defence of the fatherland” and as a harbinger of the National Struggle of 1918-1923 in the aftermath of the Great War is an approach that is almost universally adopted. This fact of universal acceptance does not in any way make this view any less misconceived! If it is true that the war effort of the Ottoman state within the Great War *in toto* has an imperialist character, the different stages, episodes or battles of this imperialistic war cannot be assessed in abstraction from this general characterisation. The Dardanelles/Gallipoli campaign is a defensive episode of a total war that is waged for imperialist ambitions. That is all. If the war carries an expansionist, predatory, imperialistic character, one of its episodes cannot be “defence of the fatherland”!

The mystique created around the Dardanelles/Gallipoli campaign is so all-encompassing that many people believe that Mustafa Kemal (Atatürk), who displayed a very successful military performance in this campaign, was the commander of this campaign. This is far removed from the truth. At that stage Mustafa Kemal was an officer at the level of colonel and had no authority apart from being the commander of a military unit among others. ***The commander of the army in the Dardanelles/Gallipoli campaign*** was, for a long stretch, Liman von Sanders, whose overall title was ***Inspector General of the Ottoman army***. Yes, *von Sanders*, a typical German aristocratic name! von Sanders was an officer of the German imperial army, just like von Bronsart, the ***Chief of Staff of the Ottoman army***, or von Kress, the ***Councillor of Enver Pasha at the Headquarters***, or, Falkenheim,

the *head of the so-called Blitzkrieg Armies*, or Souchon, the *Commander of the Navy*. The Inspector General, the Chief of Staff, the General Staff Officer, the army commander, the navy commander, these are all German, but the victory is national! The Turkish people must put an end to this self-mockery! The Ottoman state had, in a certain sense, become an extension of the German state during the Great War. The common objective of both (and of the Habsburg Empire, their partner) was to capture the colonies of other imperialist countries and pillage the wealth of those countries as a result of the repartition. This was, by its very name, repartition on a *world scale*. One cannot hence attribute a national defence character to individual battles or campaigns.

To claim that, by repelling the Allied armies, the victory of the Ottomans in the Dardanelles/Gallipoli campaign made the October revolution possible and to boast for this achievement is sickly behaviour. Even if it were true that such a victory of the Ottomans isolated Russia from its allies and thus left it frail and bloodless and, further, that this led to the workers and peasants to rise up and accomplish a revolution, this is by no means testimony to the progressive nature of the Dardanelles/Gallipoli war. Even many a negatively assessed, even detestable events in history have created an environment amenable to positively assessed events, which fact is simply a result of the dialectical character of change in society. By following the logic advanced with regard to the victory of the Ottomans in the Dardanelles/Gallipoli war, the real proximate cause of the October revolution, the participation of Czarist Russia in the Great War, would have to be seen in a positive light as well!

As for the campaigns in the Middle East that resulted in the secession of the Arabs from Ottoman rule, this much can be said: The Ottomans did not have any legitimate historic claim on those lands anyway. Those territories had been home to different Arab societies and states for long centuries. To characterise the conduct of the Arabs as a “stab in the back” or as “perfidy” is unacceptable.

This analysis of the position of the Ottomans within the Great War inevitably summons the question “what policy should socialists have adopted?” Since it is not only those who pursue a line that is a hybrid between Kemalism and socialism but also a majority of socialists who consider the Dardanelles/Gallipoli campaign a heroic “defence of the fatherland”, the answer by the majority of the left to this question is obvious. Under other circumstances, our approach would, without a shred of doubt, also have been the defence of a semi-colonial country against imperialist aggression. To cite a single example, when Italy attacked Tripoli (Libya) in 1911, which was an Ottoman possession, both the major spokespeople of international socialism and the socialists of the Ottoman lands stood by the Ottoman side and for the defeat of the Italian army.<sup>27</sup> This is the correct stance under those concrete conditions.

<sup>27</sup> The Italian Socialist Party, as well as Lenin, Trotsky and Kautsky sided with the Ottomans, qualifying the Italian initiative as “an instance of imperialist banditry” (see Savran, *Avrasya Savaşları*, op. cit., p. 53.) The Salonica Workers’ Federation, on its part, characterised this aggression as “brigandage undertaken by the Italian government, which has received the approval of the great powers of capitalist Europe in underhanded fashion” (see “Osmanlı Sosyalistlerinin Balkan Federasyonu Çağrısı”, *Gerçek*, October 2012).

However, the position of the Ottoman state within the Great War is different, as has already been explained. The Ottomans were out to fight for dividing up the world as much as the other Great Powers. It is obvious that under these circumstances the most correct policy should have been *revolutionary defeatism*! The fundamental task of Ottoman socialists, and in particular of Turkish socialists, in World War One should have been to fight for the defeat of the Ottomans. This is both the most effective policy against the sending of the workers and peasants to death for the sheer appetite for plunder of the emerging Turkish fraction of the bourgeoisie and the most correct policy for preparing the revolution. Moreover, on the basis of this policy Ottoman socialism will have contributed to the killing of two birds with one stone. It will have contributed to the defeat of imperialism, fighting the war as if the Ottoman state and army were an inseparable part and parcel of the German empire. This way Ottoman socialists would have found themselves on the same front as the heroic revolutionary Marxists of the German socialist movement, Rosa Luxemburg and Karl Liebknecht.

We have seen no sources on the position of Turkish socialists in the war (for instance that of the *Osmanlı Sosyalist Fırkası*-Ottoman Socialist Party). We will get back to the position of the Armenian socialists below. But it is obvious that the policy that we are defending *ex post factum* is diametrically opposite to the “patriotic defence of Çanakkale (Gallipoli)” line.

## 7. Genocide and primitive accumulation

*Capital comes [into the world] dripping from head to toe, from every pore, with blood and dirt.*

Karl Marx<sup>28</sup>

The shortest section of this long article will, ironically, be on the Armenian genocide of 1915. As we indicated in our introductory remarks, for the purposes of this article the existence of a genocide is not a point of debate but a presupposition. The aim of the article is to explain an already existing genocide on the basis of the historical materialist method, within the framework of class struggles. What has been explained so far has really laid the stones that pave the road to genocide. Rather than narrate the events or count the casualties or engage in a debate on what is and what is not a genocide or try to determine whether it was a unilateral massacre or a mutual one, we will attempt to present in synthetic form all that has been said about what historical basis the genocide rises upon. In other words, we will summarise the political and socio-economic dynamics of this human catastrophe and crime against humanity.

The genocide that started with the mass deportation of the Armenians out of Anatolia had two interrelated objectives at two different levels. First, from the geostrategic point of view, or in other words from the point of view of the necessities of the administration of the state, the Armenian question had formed the Achilles’ heel of the Ottoman state vis-à-vis the European Concert of States. If the breakaway

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<sup>28</sup> Karl Marx, *Capital*, volume I, New York: International Publishers, 1967, p. 760.

of the Balkan countries from the Ottomans (this is what the famous “Eastern Question” is, in the narrow sense) had created a traumatic impact, the Armenian question concerned a geography that lay at the very heart of the Ottoman state, that is to say Eastern Anatolia. If the principle of “from the sea to the sea”, dear to the heart of Armenian nationalism, were to be implemented, this would imply the breaking away from the country of a vast territory from Trabzon (Trebizond) to Çukurova (Cilicia). Moreover, the Muslim population inhabiting this territory was larger than the Armenians (or than the Greeks in the Black Sea region). In a certain sense this was a problem insoluble on bourgeois bases. Enver and Talat decided that the “final solution” to this problem was to put an end to Armenian presence in Anatolia. The genocide is a product of this “final solution”.

The second dimension of the question was more socio-economic than political and brought out the class basis of the question. This was an extreme method whereby the Muslim-Turkish fraction of the Ottoman lands endeavoured to destroy the superiority of the non-Muslim bourgeoisie and greatly speed up the primitive accumulation of capital by forcibly grabbing the property originally owned by the latter fraction and by the non-Muslim population at large.

The episodes of ethnic cleansing against Anatolian Greeks (the “Rum”) that occurred in the Aegean, Central Anatolia, and Black Sea (Pontus) regions during the extended war that lasted from 1911 to 1922, starting from the war of Tripoli, Libya, to the end of the National Struggle as well as the population exchange that was organised between Greece and Turkey are measures of ethnic cleansing that reinforce the impact of this genocide. “Thanks” to these the non-Muslim peoples became truly “minorities” after 1923, in the republican period, and then were gradually erased totally from Anatolian soil.

The first dimension was achieved through the destruction of the Armenians as a population. This need not take the form of murdering each and every single Armenian. The driving of Armenians from their historic homes of Western Armenia, (migration to Eastern Armenia or fleeing abroad to form a diaspora), their Islamisation, semi-forcibly marrying Armenian women to Turks or Kurds again involving their Islamisation, the Turkification of young Armenian children on a mass scale in orphanages etc. were all methods through which the Armenians were condemned to erasure from Anatolian soil. This is the classical definition of genocide!

This second aspect starts from the forcible deportation of Armenians from their home with Arab deserts as their final destination (the famous “Deportation” with a capital D) and is completed when they are exterminated or they or their inheritors are deprived of the possibility of returning to claim their property. This dimension was finalised by the passing of new legislation under the overall title of “Abandoned Property”.<sup>29</sup> (The appellation is indeed ironic, as if the Armenians *willingly* abandoned

<sup>29</sup> The sources on this topic are increasing gradually. See Akçam/Kurt, op. cit.; Sait Çetinoğlu, “Diyarbakır’da Ermeni Mallarını Kim Aldı?” [Who Took the Armenians’ Property in Diyarbakır?], Paper presented to the Diyarbakir Conference, 2011; Aslı Çomu, “Çukurova Bölgesinde Mübâdilere Dağıtılan Ermeni Emlak-ı Metrukesi” [The Armenians’ Abandoned Property Distributed in Cilicia to Those Who Were Part of the Exchange], in Sait Çetinoğlu/Mahmut Konuk (eds.), *Öncesi*

their property behind them!) Not only socialist but all conscientious people must understand this fact: outside a few cities such as Istanbul and (partially) Izmir Armenians from all regions, from the Westernmost province to the Easternmost, all were driven from their home towns, their ancestral hearth, merely within the space of a year. Let us pursue the thinking of some of our so-called historians and even go so far as to assume that none of these people were killed, that they all fled wherever they could, be it Yerevan, Beirut, Damascus, Nicosia, Cairo, Paris, Marseilles, Los Angeles, Boston, or Buenos Aires. One fact will stubbornly pursue us everywhere we go: all the portable and immovable property of these people, their houses, their fields, their herds bovine or ovine, their beasts of burden, their poultry, their vineyards and gardens, their workshops, their stores, their factories and manufactories, and all other instruments of industrial production, their bank accounts, their receivables, everything they owned remained behind. It is as if the Armenian community under the Ottoman state were attacked and robbed by bandits in the dark of the night. ***This entire community was dispossessed, in other words, of their belongings. Their entire wealth, however modest, was expropriated in the distinct Marxist sense of the term.*** The so-called *Emval-i Metruke* legislation is but the legal smokescreen for this dispossession/expropriation.

To decide what proportion of those whose means of production were taken away from them were capitalists, what proportion traditional landowners and what proportion petty-bourgeois and to determine what proportion of those who were stripped of their durable means of consumption, i.e. their houses, furniture, fixtures, clothes, means of transportation, animals etc. were proletarian or semi-proletarian is a detail not possible to discover not only by people like us who are not historians, but in all probability by professional historians as well, since all the documents are kept away from the public eye. (Even if there were documents still kept intact and even if these were brought to light and permission were given to historians to thoroughly examine them, one can imagine what a formidable task it would be to make an inventory of the belongings and possessions of an entire people counted in the millions.) Let us only point out several conclusions that can be drawn from this incontestable fact of dispossession.

1) The process of expropriation that was experienced in 1915 has certain dimensions that correspond to those of a process of primitive accumulation. The dimension that is most extensive is the forcible separation of the Ottoman Armenian peasant from his farm and field and the Armenian artisan and small merchant from his workshop or his store with ***a part*** of these means of production being appropriated by the Muslim ruling classes and, to the extent that capitalist relations have developed and are further developing in the country, becoming capital in their hands. This is a typical case of primitive accumulation: at one pole, the direct producer becoming a proletarian; at the other, the means of production becoming capital.

2) We say “a part” because all data show that a part of the property of the

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*ve Sonrası ile 1915. İnkâr ve Yüzleşme* [1915 Before and After, Denail and Confrontation], Ankara: Ütopya Yayınevi, 2013, p. 103-109; Nevzat Onaran, “Ohanneslerin Tarlası ‘Kimin’?” [To ‘Whom’ Does the Field of Ohannes Belong?], *ibid*, pp. 110-163; Mehmet Polatel, “İttihat Terakki’den Kemalizm’e Ermeni Malları”, [Armenian Property from the CUP to Kemalism], *ibid*, pp. 164-211.

Armenians was turned over to Muslim migrants of different nationalities fleeing repression in the Balkans and the Caucasus. If the land, built structure, farmland, means of production as a whole is not sufficient to produce more than what the family can produce with its own labour, this implies that in the new situation as well the ranks of the rural or urban petty-bourgeoisie will grow. Thus, the nationality and the religious affiliation of the small producers will have changed but the class relation remains constant. This cannot be characterised as primitive accumulation. There may even be situations in which the means of production of an Armenian large farmer or factory owner may be shared out among a multitude of migrants in which case the wealth will not be centralised (as it should have been if this were primitive accumulation), but, on the contrary, dispersed among many. This may act partially as a land reform. Hence, it is important to determine, although this is very difficult to do in practice, what proportion of the Armenians' property left behind is distributed in the form of small property and what proportion is turned over to the ruling classes or potential bourgeois (for instance to officers and civil servants who were partisans of the CUP).

3) The classical form of primitive accumulation resolves itself into the processes of the dispossession of the direct producer and the conversion of the means of production (in particular of the land and built structures on it) the direct producer is thus separated from into capital. However, Marx also mentions the plunder conducted by the nascent bourgeoisie (at the time of his writing on the subject almost exclusively the bourgeoisie of the Western European countries) all around the globe. Even if the previous owners of the of the means of production or circulation are not direct producers, those means of production that are forcibly grabbed or appropriated by hook and crook may be considered to be a part of the process of primitive accumulation. In this sense, all the property grabbed by the Muslim ruling classes from Armenian merchants and productive capitalists are an aspect of primitive accumulation. The genocide manifested itself as an aspect of struggle *between* classes (see paragraph 1 above) while here it is again class struggle, but a struggle *within* the same class, a struggle between the different fractions of the same class.

4) There is an intriguing side effect of the genocide in the context of this last type of expropriation: in situations where elements of feudal or semi-feudal ruling classes appropriate the property of the Armenian merchant or productive capitalist, the net result will be not one of progress but one of retrogression of capitalist development on Anatolian territory. Social wealth that used to be utilised as capital and contributed to capital accumulation is now being devoted to production of a feudal nature or directly to excessive consumption. If that is the case, it is important, from the point of view of class analysis, to calculate in what proportions the so-called *emval-i metruke* was distributed or grabbed by the different classes and layers of the Muslim population, even though we have already determined that such calculation is quite difficult to accomplish at this stage of history.

5) Alongside the question of the proportions in which the *emval-i metruke* was distributed among the different classes, it is important to find out also which classes within the Armenian "*millet*" were massacred and/or dispossessed in what

proportions. There can be no doubting that, with certain exceptional regions, Armenians from all parts of Anatolia were uprooted from their ancestral homes and deported. But certain fine details are important. *From the point of view of the massacre*, it is *a priori* a higher probability for upper-class Armenians to have bribed their way out of the typical routes of deportation or used other methods (social influence, personal friendly relations with the right Muslim notables etc.) to avoid this and instead taken refuge in some corner of the world in a planned manner. The Istanbul Armenians, on the other hand, are an entire category of their own. If we leave aside the politically active Armenians and the intellectuals that were apprehended during the detentions of 24 April 1915 and immediately before and after that fateful date, most of whom were assassinated at a certain point, it would be interesting to research into the extent to which the amira and the bourgeoisie of Istanbul were spared for class reasons. This cannot be dismissed by saying that Istanbul was much more susceptible to the scrutiny of the rest of the world. There were consulates of European countries in many cities of Anatolia and the missionaries were active observing every move of the Ottoman state even in the remote backwaters of the countryside where there were sizable Armenian populations living. Here again the devil is in the details. If one is to believe the official documents of the government, during the period of the armistice tens or even hundreds of thousands of Armenians returned to the country.<sup>30</sup> One is permitted to assume that they were not planning to go on living as before in a country where their nation had been decimated, but were back for the liquidation of their assets, striving to save whatever they could and go settle in whatever corner of the world they could migrate to. Here is the question: what is the class composition of this group of people? For deeper reflection on the matter would suggest that the cost of the return trip and the advantages of bribing or social prestige and influence and the mere fact of the expectation from this trip showing that there is a lot to lose should the person not come back—all of this suggests that the returnees were very heavily skewed towards the wealthier classes, i.e. the bourgeoisie and the richer layers of the petty-bourgeoisie, including the more modern wing of that class, the professionals etc. This means that before all this research has been carried out, it is impossible to definitively establish to what degree the genocide and the process of expropriation that accompanied it bears a perceptibly distinct class character.

6) Finally, the Syrians and the Assyrians who were subjected to the same treatment as the Armenians during the war and the Greeks of Pontos to the extent that they were similarly treated and those who were later forced to settle in Greece on the basis of the official population Exchange of 1922-1923 should also be brought into the overall balance sheet.

## **8. The part played by German imperialism in the genocide**

We saw above that during World War One the commanding staff of the Ottoman army was almost completely in the hands of German generals and admirals. There was even a rule that stipulated that whenever a Turkish officer was in the command

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<sup>30</sup> Akçam/Kurt, op. cit.

echelon, the staff officer would be German. (The converse is also true. All German commanders had a Turkish staff officer.)<sup>31</sup> Alongside the fact of the Ottoman army being under the command of the German general staff, Enver, the strongman of Turkey at that time, although sharing this power to an extent with Talat and Cemal, was working closely together with the men of Wilhelm II. Since this close alliance continued until the final days of the war and since the Armenian genocide did not create the least damage to this alliance, the question may very legitimately be posed of what the level of Germany's responsibility in the genocide was.

The mere fact of recalling Germany's responsibility in the genocide is met with a certain irritation in those circles that do not approach the genocide in an apologetic manner or are not oblivious to the genocide. We suppose the following is the reasoning behind that apprehension: To claim the complicity of Germany in the genocide may open the door to an alleviation of the Ottomans' guilt and may, over time, even lead to the laying of the entire responsibility on "imperialist plotting". This worry can be understood easily. But to overlook the silence of a country as important as Germany on the question of genocide for this reason is to make do with a very incomplete picture of that catastrophe.

There may also be certain others who wish to expose German responsibility for a much unhealthier reason. If the major responsibility in the genocide is to be attributed to a kind of "mentality" of Turkish rulers at a certain historical juncture, are we then going to accuse the Germans for a motive like "having a CUP mentality" as well? A different route may, of course, be taken by some: Wilhelm II might have collaborated with the Young Turks because of his "Prussian militarist mentality"! The worst is no doubt to avoid including Germany in the picture simply to attribute the genocide to the inherent evil that resides in the Turk's soul (even if the other nation happens to be the Germans who, in only a quarter of a century are going to commit the crime of the Holocaust)!

Let us repeat once more: this article is not an exercise in historiography. The existing literature is replete with evidence that proves that the high-level representatives of the German state in Turkey knew about the genocide in detail, but as a rule did not lift a finger.<sup>32</sup> The widespread opinion is that Wilhelm II and the German government did not wish to pressure Turkey with such unimportant matters since the country was a great asset for Germany both against Britain and Russia. To our mind, there is not the place for the slightest shred of doubt that Germany is the accomplice of the genocide prepared and implemented wilfully by the CUP

<sup>31</sup> Dadrian, *History*, op. cit., p. 251.

<sup>32</sup> The most important source on this question is a book of documents compiled by Wolfgang Gust: *The Armenian Genocide: Evidence from the German Foreign Office Archives, 1915-1916*, New York: Berghahn Books, 2014. We were able to consult Gust in a very restricted manner. The Dadrian volume, *Ermeni Soykırımı Tarihi* has an entire chapter (Chapter 28) full of evidence on this aspect of the matter. (*History*, op. cit., pp. 248-301. Dadrian has also devoted an entire book to this topic: Vahakn N. Dadrian, *German Responsibility in the Armenian Genocide. A Review of the Historical Evidence of German Complicity*, Watertown: Blue Crane Books, 1996. We have not had a chance to inspect this work. A recent publication in German seems to be of interest as well: Jürgen Gottschlich, *Beihilfe zum Völkermord: Deutschlands Rolle bei der Vernichtung der Armenier*, Berlin: Christoph Links Verlag, 2015.

leadership. The real question in our opinion lies elsewhere, since the literature does not raise this point and even, we would venture to add, intentionally avoids it for ideological reasons. Our intuition tells us that Wilhelm II and the German war machine played an important part in the *planning* of the genocide. In other words, Germany is not solely a passive accomplice, but the genocide is possibly its brainchild. Lest there may be a misunderstanding, let us emphatically repeat that this is simply an intuition and explain wherein lies the logic for this intuitive idea.

To begin with, Wilhelmine Germany is the perpetrator of the first genocide of the 20<sup>th</sup> century, even before the Armenian genocide. When the Great War started, only a decade had passed by since the German state had wrought genocide on the Herrero and Nama peoples of what was then known as German Southwest Africa (and today is Namibia) and almost exterminated the 80 thousand-strong Herrero population through a deliberate policy of punishment and destruction.<sup>33</sup> It was not the notorious Prussian militarist tradition alone that lay behind this savagery, but the hunger for colonies of the industrial powerhouse Germany that had come late to the imperialist league, whereas Britain, France, Belgium, the Netherlands, Spain, Portugal and others had already divided up the world between them. This is the kind of leadership that led this new giant into the Great War, coalescing with the Ottoman Empire which, to its mind, held the keys to the entire continent of Asia. It would not be surprising to see Germany do the same for that invaluable ally. Not to forget that the same needs and a part of the cadre that had served on Ottoman soil during World War One, including the notorious Hitler supporter Fritz von Papen, would drag Germany, only a quarter of a century later, to the Holocaust and the full-scale massacre of the Roma. The Kaiser, to be brought down by the 1918 German revolution, was himself an advanced enemy of the Jews and would form a worldview akin to that of Hitler towards the end of his life.<sup>34</sup>

Secondly, the sources that we have used on Wilhelmine Germany attest to the fact that the Kaiser held foreign policy tightly under his control, even saw it as his private turf, and used extremely secretive methods in this area.<sup>35</sup> On the other hand, historical record shows that there is an immensely close relationship between the Kaiser and Enver to a level that can simply not be taken as ordinary.<sup>36</sup> Our suspicion is that the Kaiser had turned Enver into a follower of his when the latter served as military attaché in Germany and became, at the beginning of, or even before, the war at least an accomplice of the genocide through his men taking part in the planning process.

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33 Jeremy Sarkin, *Germany's Genocide of the Herrero: Kaiser Wilhelm II, His General, His Settlers, His Soldiers*, Cape Town: UCT Press, 2011.

34 John C. G. Röhl, *The Kaiser and His Court. Wilhelm II and the Government of Germany*, Cambridge: Cambridge University Press, 1994, s. 190-212.

35 In addition to the source cited in the previous footnote, see John C. G. Röhl, *Wilhelm II. Into the Abyss of War and Exile 1900-1941*, Cambridge: Cambridge University Press, 2014 and Annika Mombauer/Wilhelm Deist (ed.), *The Kaiser. New Research on Wilhelm II's Role in Imperial Germany*, Cambridge: Cambridge University Press, 2003.

36 Enver was on a mission twice in Germany before the war and became close to the Kaiser. There is evidence that Enver surreptitiously visited Germany and visited the Kaiser in spring and July 1914, and again in April 1917. See Dadrian, *History*, p. 290.

Even if we did not take things so far, in any case one of the factors that marked the Armenian genocide is that Germany entirely condoned and covered up the crimes of the Ottoman state. Thus, the genocide is also a product of the war of repartition in the early world war. In other words, it is a *result of class struggles within the imperialist bourgeoisie*.

We wish to terminate this section of the article by referring to Karl Liebknecht's attitude on this question. This comrade-in-arms of Rosa Luxemburg who stood up to the part played by Wilhelmine Germany in the imperialist war with the battle-cry "the real enemy is among us!" and who, while a vote was being taken on the floor of the German Reichstag on war credits in December 1914, cast the only "no" vote among the entire membership of that body, submitted to parliament a demand for a parliamentary investigation in January 1916: "Is the Imperial Chancellor aware that in the present war in the land of our ally the Turkish empire hundreds of thousands of Armenians have been exiled and massacred?" The Director of the Political Department of the German Foreign Ministry, Ferdinand Carol Baron von Stumm will reply to Liebknecht's question in the following words:

The Imperial Chancellor is aware that some time ago, the Sublime Porte, under the pressure of our enemies conspiring to provoke an insurgency, has evacuated the Armenian population in certain regions of the empire and has allocated them new regions to reside in. There is ongoing exchange of opinion between the German and Turkish governments as a result of the fact that these measures have caused certain echoes. No further details can be disclosed.

Liebknecht insisted on the matter by pointing out that Johannes Lepsius "talks about practically the annihilation of the Armenians".<sup>37</sup> The speaker of the house rang the bell, stopped Liebknecht's intervention and did not allow him to continue talking.<sup>38</sup>

For Baron von Stumm to say that the Ottoman government had "allocated new regions for the Armenians to reside" is of course a masterpiece of black humour. The Baron is probably referring to the graves of the Armenians who died in the process. But even here there is a confession: the Baron admits that "these measures have caused certain echoes". As a result, the German and Turkish governments are exchanging ideas. We can easily surmise that the "exchange of ideas" concerned the question of how to cover up the unpalatable facts.

As can be seen, there is only one member of parliament in the majestic democratic parliament of the bourgeoisie who wishes to bring this abominable crime against humanity into daylight: A Marxist, a communist!

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<sup>37</sup> Johannes Lepsius was a German writer and missionary who had already delved into the Armenian question in a book written before the genocide titled *Armenien und Europa: Eine Anklageschrift wider die 1896*, exposing the part played by the Great Powers during the Abdulhamid massacres. He later documented the genocide during the Great War in a report titled "Bericht übe die Lage des Armenischen Volkes in Der Türkei". This report is possibly what Liebknecht is referring to.

<sup>38</sup> Wolfgang Gust, *The Armenian Genocide*, op. cit., p. 92.

## **9. What political position toward the Armenian genocide?**

We ask the reader to stop reading for a moment and ask himself or herself what to do when such a great crime against humanity is being committed. Imagine for a moment a similar situation arose in your own country. What is to be done?

Given the fact that wars and massacres became so commonplace in the 20<sup>th</sup> century, the answer might simply be to behave in the same manner as how one would behave in other comparable situations. The highest figure of casualties cited for 1915 is 1.5 million. In our own region of countries, there have occurred catastrophes that approach this figure. For instance, approximately one million people died in the Iraq-Iran war between 1980-1989. Or the number of people who lost their lives in Iraq after the US invasion is counted in the millions. Hundreds of thousands of people died in the Syrian civil war. And yet, the Armenian genocide or genocides at large differ from these terrible situations. For one thing, the victims are indiscriminately children, babies, the elderly, or women not under arms, or in other words, all sections of the non-combatant population. And, on the other hand, what is destroyed in genocides is not individuals that can be calculated on the basis of finger counting; it is an entire nation or people or nationality or race. Let us then ask once again: what was to be done and what was done?

Naturally, we are going to try to answer this question from the point of view of left-wing political movements. The first type of political movement we will take up will be socialists of the oppressor nation. (The Kurds have not, as of that point in history, yet displayed any type of indication of a socialistic political orientation.) We already pointed out above that a policy of revolutionary defeatism was the correct line for Turkish socialists. Some readers may have found this idea quite freakish or even repulsive. We then ask the following question: When the events of the genocide were so glaringly obvious and when it was clear that this was part of the grand strategy of the CUP leadership for the war, how could one even imagine a policy different from revolutionary defeatism? The Turkish socialist who refuses revolutionary defeatism in World War One is condemned to becoming the accomplice of Enver and Talat! The position of “Let me stand up against the killing or even the deportation of the Armenians, but let me pursue a defencist policy in the Dardanelles/Gallipoli war” displays a deep misunderstanding of politics.

What is more complex is the situation of Armenian socialists and revolutionaries. What should an Armenian revolutionary have done when confronted with the massacring and exile of the people he or she is part of? Before answering this question, it should be recalled that Armenians did rebuff the command of deportation and resist in a series of very limited pockets. Zeytun, strong with its experience of 1896 (see above) or Musa Dağ (Musa Mountain) in the province of Hatay are the most striking instances. The massacre created much less of an impact in these instances and in the case of Musa Dağ the population was saved thanks to the assistance of outside forces.<sup>39</sup> These exceptions summon us to pose the following question: Why did the entire Armenian people not resist when it was

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<sup>39</sup> Franz Werfel, *Musa Dağ'da Kırk Gün* [Forty Days on Musa Mountain], Istanbul: Belge Yayınları, 2024.

almost clear as daylight that such a big catastrophe was coming? The answer to this question involves a great lesson, that is perhaps even generalisable: When a political line is established in an erroneous way at the very beginning, then it might become impossible to set it right after a certain point has passed. This is the lesson. In our concrete case, when the socio-cultural properties of the Ottoman Armenian community are taken into consideration (a very male-dominated community, even more than the surrounding Muslim population), it was not possible for the Armenian community to resist because fighting-age Armenians had already at the outset of the war been mobilised in the so-called “labour battalions”. These battalions were military units in the area of military engineering, in other words of fortifications, in which the Ottoman government isolated young Armenian men when it had decided that the Armenians were a security threat for the empire. The most important aspect of the labour battalions is the fact that the Armenian fighting-age male population was thus being *disarmed*.<sup>40</sup> Thus, this population was captive in a kind of prison-house when the deportation started! So, these captives were helpless in the face of the persecution suffered by their community and their families, their mothers and wives and children and the elderly and were themselves cruelly murdered on the roadside.

It would be naïve not to think that this whole situation had been conceived at a very early stage. Why, then, did the Armenian community fall for this? Because the Armenian parties on both sides of the Russo-Ottoman frontier declared, as soon as the war started, that they were going to pursue a policy of defence of the fatherland! Despite all the hue and cry raised today by Turkish nationalist historiography, it is a fact that the Armenian “millet” loyally served the Ottoman state in the early phase of the war until the deportation began! The cases of violent confrontation between the Armenians, on the one hand, and the Turks and the Kurds, on the other, were not due to insurgencies behind the frontline but to Armenian units that accompanied the Russian army.

This means that the Armenian parties took the decision to have, for instance in the Sarıkamış battle, the Russian Armenian to serve under the command of the Czarist army and the Ottoman Armenian to serve under the command of the Ottoman army. Had the Ottoman Armenians had access to weapons, they would have been sent to kill each other! This was true to such an extent that it even brought brothers face to face on the battlefield. Karekin Pastirmadjian, a member of the Ottoman parliament for the Erzurum province, defected to the Russian side as the war was starting while his brother Vahan Pastirmadjian served in the Ottoman army. It has been determined in the historiography of the battle that the military units in which the two brothers respectively served did confront each other during the war!<sup>41</sup>

A political line of an unprecedented absurdity in the annals of nationalities that live on the two sides of a political frontier under the oppression of two different

<sup>40</sup> There is an abundance of sources on the Labour Battalions. Basic information may be consulted in this article: Ayhan Aktar, “I. Dünya Savaşı’nda Osmanlı Ordusunda Ermeni Askerler” [“Armenian Soldiers in the Ottoman Army in the First World War”], *Toplumsal Tarih*, March 2015, pp. 30-38.

<sup>41</sup> Ibid, p. 32.

oppressor nations! The only excuse imaginable would probably have been of the type “had we taken another line, we would have been considered to be traitors and therefore slaughtered”. One would have smiled painfully in the face of such an excuse, had the stakes at hand not been this tragic. It transpired that, under such conditions of imperialist rapaciousness, one did not need to be a traitor to be slaughtered *en masse*. To support the voracity of two decrepit empires share out the world in a feast of vultures!

Once the Armenian revolutionary movement adopted this inane, nay insane, policy, it would inescapably side with the mobilising of the young male population of the Armenian community, who, given the nature of the “labour battalions” would therefore be disarmed and become harmless for the Ottoman state. The error having been committed at the outset, no turning back! In politics, lack of clairvoyance leads to disaster even when the intentions are of the best kind!

It is inconceivable that by summer 1914, when the war began, the Armenian revolutionary movement should not have realised that the revolution of 1908 had now entered its Thermidorean phase and that the Young Turk government had now become dangerous. In effect, the 7<sup>th</sup> Congress of the Hunchak, meeting in Constanta (today in Romania) adopted the following resolution:

Taking into consideration the fact that the Committee of Union and Progress is striving to establish an aggressive Turkish socialism and that this is of a very *lethal* and harmful nature for the other political parties and in particular for the diverse minorities [“elements” in Ottoman parlance in the original], the Seventh General Assembly of Delegates of the [Social Democratic and Hunchakian Committee] resolves to prohibit its entire set of active organs from cooperation with the said party and not to shirk any labour and effort to fight against the said party in order to oust and destroy it.<sup>42</sup>

To decide meekly to defend the fatherland in a world war under a government that you regard to be “lethal” for minority nationalities! To add insult to injury, it is this self-same government that, through an Imperial Edict of Sultan Mehmet Reşat, has declared this war to be the *Cihad-i Ekber* (Grand Djihad) and, basing itself on the fact that the Sultan is at the same time the Caliph of the entire Muslim world, therefore, a *Cihad-i Mukaddes* (a Holy Djihad). What would a *Cihad-i Mukaddes* imply for the Armenians?

Let us be very clear: for Enver, the Armenian people is a barrier in the way of the unification of the Ottoman Empire with the great Turkish and Muslim universe of the Caucasus and Central Asia, even extending to Afghanistan and India. Its extermination has come on the agenda for this reason. The fact that Armenian revolutionary parties were not able to conceive anything else than “defence of the fatherland” is testimony, if such were needed, to how great a mind is the inventor of the policy of revolutionary defeatism, Vladimir Ilitch Lenin!

The correct policy for the Armenian revolutionary movement at the outset of the war would have been to declare a dual revolutionary defeatism, to arm themselves

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<sup>42</sup> Tevetoglu, op. cit., p. 53. Our emphasis.

immediately and to prepare the self-defence of this oppressed nation. That every other policy was indeed “lethal” has been proved by history.

To pose a question before concluding this section could provide a tip for us: What should Shaumian and his comrades, who were carrying out a Bolshevik organising drive in the Caucasus under the hardships created by Czarist repression, have done when confronted with the Armenian genocide? This group of revolutionaries, who were Lenin’s comrades-in-arms fighting together under Czarist rule, were naturally pursuing a policy of revolutionary defeatism, the Bolsheviks’ official policy. So far so good. But when the mass-scale killing of Ottoman Armenians began? There is no answer to this question because the Bolshevik Party refused to attribute a special importance to the Armenian national question even from the very beginning of the 20<sup>th</sup> century. It is too late now. All kinds of positions will prove too abstract and ineffective because Bolshevism has not tested the experience of organising within the Anatolian (Western Armenian) community of Armenians. We will return to this theme at the end of the article.

## **10. Socialism and nationalism in the Caucasus**

In the manner of nationalist historiography that reads Ottoman history through the eyes of the Turk, a considerable part of those who study the historical unfolding of the Armenian genocide treat the question at hand exclusively focused on the events that occurred on Anatolian soil. And yet the question is an Armenian question. The Armenians do not live in Anatolia alone, which happens to be only Western Armenia, but also in the Caucasus, the historic land of Eastern Armenia, and not only there, but also the parts of the Caucasus where Armenians do not form the majority, but wield a remarkable impact on economic, political and cultural life (today’s Azerbaijan and Georgia), especially in the large cities such as Tbilisi and Baku. Moreover, when one remembers that the Armenians were considered by Enver as an obstacle in the way of bringing the Turkic and Muslim world under Turkish domination, a point that has already been explained, then it becomes pretty clear that the policy of genocide might have very well become a threat for the Armenians living in the Caucasus.

Moreover, as we know that many thousands of Armenians, if not hundreds of thousands, who managed to save themselves from being massacred sought exile in Eastern Armenia, there is also the question of the fate of the so-called “remnants of the sword”, as they are called by Turkish chauvinists (an ugly term that is halfway to confessing that the Armenians had been subjected to a wilful campaign of extermination!), that is to be decided. A whole army may be built from among the hundreds of thousands who were subjected to such horror and lost their next of kin and their property.

In other words, it cannot be overlooked as a possibility that even if the Armenians of the Caucasus did not bother to avenge the fate of their brethren, those of the Armenians of Anatolia who were able to flee the catastrophe may have sought a way to avenge the fate of their community. That means that the genocide mongers would be sufficiently motivated to carry out a full-scale massacre in Eastern Armenia as

well. There is an infernal logic that large-scale massacres like genocides beget. Once the genocide perpetrators start the process, they soon find that they have to go all the way to the end. For if you leave the “job” half-done, there is always the very plausible prospect of the attempt at vengeance on the part of the survivors. So, the enterprise that has originally been dictated by tyranny is necessary to complete under the spur of fear. We then need to pose the following question: what kind of policy was adopted by the Ottomans during and in the immediate aftermath of the Great War toward the Armenians of the Caucasus?

In this section where we will take up the relations between the Ottomans and the Armenians in the Caucasus, we will conduct an analysis in its bare outlines. If one reason for this is that this article is already of an extraordinary length, another is the necessity of going into a wide variety of spheres in order to familiarise the reader with the region. In these territories on which have coexisted from time immemorial many different peoples and (in more modern times) nationalities in unusually entwined geographic proximity, a development in one part immediately has an impact on others, which makes it necessary to go into many seemingly irrelevant details to have a full picture. That is why we will make do with an analysis that limits itself to the bare outlines of the question at hand.

There is a very simple reason why we start looking at Ottoman-Armenian relations in the Caucasus not from 1914 but from 1918 on. The Ottoman armies suffered a rout in the early phase of the war and retreated all the way to Sivas at the western tip of Eastern Anatolia, abandoning many localities of Eastern Anatolia to Russian occupation, let alone make a foray into the Caucasus. The Sarikamış disaster, discussed above, is a striking symbol of this rout. However, when the October revolution achieves victory in October/November 1917, the fate of the so-called “Eastern Front” in Ottoman parlance changes as everything else. After revolution has come to Russia, Russian armies disperse. The Southern Caucasus (“Transcaucasia” when viewed from the Russian side) is no longer Russian territory and many different regimes are established in different parts of that territory. This raises the aspirations of the Ottomans concerning the Eastern Front. The Ottoman armies throw themselves into the power vacuum created by the Russian revolution in the Caucasus.

The year 1918 is particularly significant in this sense. For the Caucasus will remain in this limbo only until October 1918 and the Ottoman army will naturally have to cease all activity in the Caucasus when the Mudros Armistice is signed with the Allies on 30 October 1918. So, in order to study the Caucasus problem as a continuation of the genocide, one needs to look at this period separately and then take up the new situation that arises with the Mudros Armistice in its own logic.

So let us proceed by establishing a periodisation. After the period opened up by the October revolution ended with the signing of the Mudros Armistice (a period of almost exactly one year), with the foundations of the Ankara movement in the second half of 1919 and the formation of the Turkish Grand National Assembly there in spring 1920, a new period of mobilisations began on the Eastern front. The development of the so-called Turkish “National Struggle”, seeking the eviction of imperialist armies and the Greek army from Anatolia, is treated in much more

detailed fashion regarding the Western front, but less so concerning the Eastern front. There may be several reasons for this. One is the fact that the struggle reached its outcome much earlier on the Eastern Front. The conflict that started in spring 1919 ended at the end of 1920, with the overall Bolshevisation of the Caucasus, with frontiers that were to remain valid established definitively at this stage. Another reason might be that at the head of the Turkish forces fighting on the Eastern front towered General Kâzım Karabekir, who was to become a political opponent of Mustafa Kemal after the foundation of the republic in 1923. One can understand why the Kemalist camp might wish to pass in silence the military and political feats of a powerful opposition figure. All this means that from our perspective, there are two periods to look at: the ten months in 1918 and the one and a half years in 1919-1920.

The earlier period is marked, from our point of view, by three developments. The first is that the Ottoman armies relaunch their assault. The second is that Britain started to penetrate the Caucasus as soon as the domination of the Russians (now under Soviet power) collapsed in Southern Caucasus (Transcaucasia to Western ears). And the third is a most important experience of the history of socialist revolutions, the Baku Commune.

During six months in the year 1918, from spring to fall, a Soviet government was established in Baku. This is the first of its kind in the Southern Caucasus. Because it was confined to a single city and could not bring under its power even the surroundings of Baku, let alone the rest of the Southern Caucasus, it displays significant similarities to the Paris Commune of half a century before it. In order to understand the nature of the Baku Commune, the reader has to assimilate fully a point that we tried to underline above. From the point of view of the distribution of nationalities, the Southern Caucasus has not yet been separated into three homogeneous geographic territories. There are no well-defined territories whose frontiers can be delimited easily that are called Azerbaijan, Armenia, and Georgia. Most important of all, Tbilisi and Baku, which remain definitely outside Eastern Armenia and which are today respectively the capital cities of Georgia and Azerbaijan, are under deep Armenian sway, not in terms of the distribution of the population but in the economic, political, and cultural domains.

If we restrict our gaze to Baku, where the Commune we are trying to understand was established, both the bourgeoisie and at least the modern layers of the proletariat are predominantly Armenian. The peasantry and the poor neighbourhoods of Baku are, on the contrary, dominated by the Azeri population (interestingly called Muslims or Tatars in that period). The overriding characteristic of Baku in the early 20<sup>th</sup> century is its immense oil wealth. For this reason, it is not important only for Russia. The Ottomans had already set their eyes on Baku. In the power vacuum created by the October revolution, the petroleum reserves of Baku had also raised the appetite of British imperialism. In the extraction of this mineral wealth, coveted by all the powerful actors active in the region, the Armenian bourgeoisie played a part in collusion with foreign capital and those workers that could be considered to be skilled were exclusively Armenian. The existence of a working class embedded in the petroleum industry is, in fact, the reason for the fact that Baku was the first

geographic unit in the Southern Caucasus that attempted a transition to socialism.<sup>43</sup>

It is impossible to take up the experience of the Baku Commune filled with rich lessons for socialists in its full import here.<sup>44</sup> It is incumbent on us to point out what forces were effective in the structure of the Soviet that embodied power and among the commissars (a position that resembles that of ministers in bourgeois governments) that fulfilled the function of the executive (or government) of the Soviet. Alongside the two parties (the Bolsheviks and the left Socialist Revolutionaries) that had joined hands in the first coalition government in revolutionary Russia, the Baku Commune also included the Dashnak as a coalition partner. The fact that the Dashnak, which, it is true, will eventually pass on to the side of counter-revolution, did join a Soviet regime at this stage, did proclaim allegiance to the Russian Soviet regime under the leadership of Lenin, is a telling refutation of the demeaning attitude adopted by supposedly leftist Turkish nationalists regarding this Armenian party. Before it passes on to the side of counter-revolution at the end of 1918, the Dashnak is a socialist party, albeit a party of petty-bourgeois (peasant) socialism.<sup>45</sup>

Such is the political composition of the Baku Commune. The national composition, for its part, is dazzling. The Baku Commune brought together the Bolshevik and left-SR revolutionaries of Armenian, Georgian, and Azeri background, with the Dashnak commissars (who are naturally all Armenians). This experience is writ large in the annals of the history of communism as a symbol of the hope of the stepping of the revolution beyond the straitjacket posed by nationalism. At the head of this committee of commissars was Stepan Shaumian, close friend of Lenin, the leader of the Baku Commune.<sup>46</sup>

There were many achievements of the Baku Commune in practice. But there is one question which played a part in its establishment and its collapse that offers a great lesson concerning the topic of this article. The Commune is a revolutionary laboratory. Although the conditions for the victory of the revolution in Russia matured in October (or November according to the new style calendar), in Baku the

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43 The other candidate would be Tblissi, where an industrial proletariat was already relatively developed. However, for historical reasons Menshevism had always been stronger among the Georgians than Bolshevism.

44 An excellent study of the Baku Commune has been translated into Turkish. We have consulted this Turkish version, but are quoting the original here for the benefit of our international audience: Ronald Grigor Suny, *The Baku Commune. Class and Nationality in the Russian Revolution*, Princeton, NJ: Princeton University Press, 1972. Additionally, E. H. Carr's *A History of Soviet Russia. The Bolshevik Revolution 1917-1923*, volume 1, (Harmondsworth: Penguin, 1971, pp. 343-354) may be consulted.

45 The entry for "Dashnaksutiun" in the *Great Soviet Encyclopedia*, in its 1926 edition, presents the party as an organisation that reflects the "economic aspirations of the Armenian commercial bourgeoisie". This is wrong. It is very obviously done to denigrate the Dashnak in retribution for its passage to the side of counter-revolution after 1918. See Perinçek, op. cit., "Büyük Sovyet Ansiklopedisi'nin 1926 baskısında Taşnaksutyun maddesi" [The Dashnaksutiun entry in the 1926 Edition of the Great Soviet Encyclopedia], pp. 38-44.

46 To the best of our knowledge, there is only one source directly on Shaumian in Turkish: Makiç Vahami Arzumanyan, "*Kafkasların Lenin'i*" Stepan Şahumyan ["The Caucasian Lenin". Stepan Shaumian], tr. Armenak Çapartitze, İstanbul: Umut Yayıncılık, [n.d.]. Şaumian was among those in the Bolshevik Party who defended, together with Lenin, the taking of power in October 1917. In an article written in April 1917 he had recourse to the idea of "continuous revolution" (Suny, op. cit., p. 91), corresponding to Lenin's "uninterrupted revolution".

situation was ripe only in spring 1918. In this process of maturing, alongside a host of other factors, there is the recourse of the Azeri poor toilers engaging in radical action against conditions of hunger. The Azeri people have now entered a state of mind that would add strength to the revolution and is multiplying its actions. Despite this, in the process of the taking of power, in an armed conflict between Dashnak members and the Azeris, many Azeris were killed.<sup>47</sup> This resulted in the rallying of the Azeris around the Musavat Party and led to a limited support on the part of the Azeri community to Soviet power in Baku. Thus, there are Azeris in the Soviet and among the commissars, but the rank-and-file support they receive is weak relative to that of Musavat, a nationalist bourgeois party. The lack of penetration of the surrounding countryside by the Commune is itself due to the fact that the peasantry is predominantly Azeri.

Hence, this fabulous revolutionary experience bears within its genetic makeup a deep defect due to a breach created along national lines. The collapse of the Commune in the fall is almost exclusively the result of a development that was a consequence of the same breach, albeit somewhat different in its manifestation.

We now need to bring in the other two factors that we earlier said had marked the year 1918. In the situation in which the Czarist army dispersed as a result of the Russian revolution, the Ottoman army relaunched its assault, reconquering the regions of Eastern Anatolia earlier occupied by the Russians and marching at full speed on the Caucasus. The meaning of this for the Armenians was the occupation of Eastern Armenia also by the organisers of the genocide and the threat of all Armenians being put to the sword. To add insult to injury, the commander of the Ottoman military unit marching on the Caucasus was none other than Halil Pasha, the uncle of Enver! There is some evidence that the mission of Halil Pasha was indeed to extend the genocide committed on Anatolian soil to Eastern Armenia. Leaving aside other pieces of evidence let us dwell on the most striking one: In his memoir, Halil Pasha admits that he has murdered “approximately ... 300 thousand Armenians”. And in 1918 in discussion with an Armenian group, he talks of “the Armenian millet, of which I am striving to annihilate down to the last individual”!<sup>48</sup> Whether this is true or not, it is self-evident how the Armenians of the Caucasus, among which there are also the tens or hundreds of thousands of Armenians of survivors of the Anatolian butchery, will perceive the advance of the Ottoman army.

It is this advance that created a deep political cleavage within the Baku Commune. Many elements within the Commune, with the Dashnaks at their head, defended the idea of calling, in the face of the “Turkish threat”, for help from Britain, which, the reader may remember, is striving to penetrate the Caucasus as an actor. This implied taking refuge under the protection of the major counter-revolutionary force, Britain, as the high winds of the Bolshevik revolution were blowing throughout the entire region. In practice, this meant asking the Commune to turn its back on Soviet Russia. Consistent proletarian revolutionaries simply could not accept such a

<sup>47</sup> It is highly probable that some among the Dashnaks wishing to avenge the genocide in Anatolia played a key part in these events.

<sup>48</sup> Dadrian, *History*, op. cit., p. 353.

proposal at this historic moment. Shaumian and his comrades rejected the proposal. After a long internecine struggle, at a vote taken in an enlarged Soviet meeting, the partisans of British intervention won the day with a very slight margin. Shaumian and the commissars resigned from their posts and decided to leave the city. But as they were fleeing, they were captured by counter-revolutionary forces. All the historical evidence shows that the 26 commissars were executed with the approval of British agents on 20 September. This was only four months before the same fate descended on the leadership of the Communist Party of Turkey in January 1921. An irony of history full of lessons!

It should be added that the Dashnak strategy that aimed to bring the Baku Commune under British protection served no purpose. Britain did not prepare serious fortifications here. What brought the situation under control was the resigning of the Talat Pasha cabinet of the CUP approximately a fortnight after the murder of the commissars and the signing of the Mudros Armistice approximately one month after that incident. It was not British imperialism that saved the Armenians of the Caucasus (and those Anatolian Armenians that had taken refuge there), but the implosion of the Ottoman Empire and the admittance of its defeat in the Great War. In between, the victim was the socialism of the Dashnak, which permanently sided with imperialism after this turn. With the withdrawal of the Ottoman army, the defeat of the Baku Commune, and the British political support for the Dashnak coming together, an anti-Soviet independent Armenia was established led by the Dashnak. The latter was now set on a course through which it would become a fully-fledged counter-revolutionary party.

The second period we need to tackle is the war between the armies of the Ankara government of Mustafa Kemal and Armenia. We need not go into the details of this episode except to say that whatever is said in terms of accusations regarding either army, there is no historical evidence that the Kemalist side harboured the objective of continuing the genocidal policy of the CUP at this stage of the struggle. This struggle was terminated by the step-by-step Sovietisation of the entire Southern Caucasus in the course of 1920 and the drawing of frontiers between the new Soviet administration and the Ankara government on the basis of treaties signed in early 1921.

In order to be able to advance a judgment on the war on the Eastern front led by the Ankara government, one needs to turn to the developments in Anatolia and take up the developments in the same period.

## **11. The national question in Anatolia**

Before we pass a judgment on the war in the Caucasus, we need to return to the soil on which the genocide was implemented, that is to say Anatolia, and take a closer look at the national question in the framework of the new situation born of the Great War and the genocide. There is no reason why this glance needs to constrain itself with the alternatives of the Sèvres and Lausanne Treaties, as is routinely done by the Kemalists and their bitter foes on the Islamic right, but also among the liberal left. Both Lausanne and Sèvres are extreme solutions that would,

in all probability, not have been implemented had the proletariat come to power in Anatolia. The factors that define the framework of the problem can be summarised in the following manner:

1) Although Sèvres represents some kind of advance relative to the Ottoman period with in its capacity of recognising that the Armenian and Kurdish peoples possess certain national rights on Anatolian soil, its overriding character is defined by the plundering of Ottoman territory by imperialist powers and their proxy forces.

2) The occupied regions and zones of influence accorded to the various imperialist powers and their proxies were a clear trampling upon of national rights.

3) The project for Greece taking control, through the support and even the incitement of British imperialism, of a vast expanse of territory in western Turkey meant a claim of ownership that was five centuries old and disregarded the facts of the present situation which was characterised by the reality that, almost in every region of Anatolia the Turks (or the Turks and the Kurds together) claimed a majority or at least a plurality, of the population. The heroic implementation of the policy of revolutionary defeatism by the Communist Party of Greece (the KKE) in its early period, before its Stalinist degeneration, is both a confirmation of the truth of this statement and a monument of pride for all proletarian internationalists.

Let us, then, draw a preliminary conclusion. When we draw an imaginary line that connects the cities of Samsun-Sivas-Antep-Hatay, in the entire region to its west the rights of the Turkish nation have been trampled upon by imperialism and its proxies. The Turks are now an oppressed nation vis-à-vis **not** the other nationalities of Anatolia but imperialism. Therefore, the policy of **revolutionary defeatism** that was advocated for the Great War should now be replaced by a policy of **defencism**. The proletarian forces of the country should fight in alliance with the patriotic forces against imperialism and its proxies. ***The struggle of the Ankara government is, in this sense, an entirely just cause and objectively bears an anti-imperialist character*** (which is very different from saying that the leadership of this struggle is also subjectively speaking anti-imperialist).

4) The Kurdish national question is a vast problem in its own right, but its character is very different from what it is today. All Kurds cannot be held responsible for the Armenian genocide, any more than all Turks can be held responsible. Nonetheless, it is a clear fact that the Kurdish tribes and the local notables of bigger Kurdish cities (in particular Diyarbakir) became partners in crime in pursuing a policy of extermination and dispossession of the Armenians, hoping to benefit from this by becoming the dominant nation in the region. It is also clear that the Kurdish nation was marching in the footsteps of these ruling classes and strata. In the period immediately after the Great War, the Kurds are not really scared of the oppressor nation the Turks but afraid that the Armenians will grow in power. In effect, the Sèvres Treaty stipulated the attribution of certain regions the Kurds regard as their own fatherland (for instance Van and its environs) to the new projected Armenia. To summarise, due to these two reasons, i.e. because of their responsibility in the Armenian genocide and the fear of a Greater Armenia, the Kurds joined their fate with the Turks, the oppressor nation of the Ottoman period. The Ankara government did everything it could to ensure that no breach appeared in this united front with

the Kurds. In other words, the Kurds, excepting a minority rebellion in Koçgiri, coalesced with the Ankara government on the basis of their own assessment.

However, there are two problems here: the first is the sudden reversal of the situation in 1925, with the atmosphere being one of increasing repression; and secondly comes the question of the remaining parts of Kurdistan (i.e. the parts of Kurdistan in today's Iran, Iraq and Syria). These are landmarks that provide hints as to where the real solution lies.

We can now draw a second preliminary conclusion: the population of the region of Kurdistan that is today within the frontiers of the Republic of Turkey participated in the war under the Ankara government on its own volition. Hence this war is valid also in those regions that may be called Southeast Anatolia, which were abandoned to French and British dominance, but which could be imagined as territory of a Kurdistan in the future.

5) Thus, the only controversial question turns out to be the territory of the state of Armenia stipulated by Sèvres. Here, the new situation created by the genocide is, legally speaking, an entirely invalid status quo. What we mean is this: in the post-genocide situation, no one is entitled to advance the argument: "well, there lives no one of Armenian background in Malatya (or in Sivas) (or perhaps just a few families) and, therefore, these regions belong rightfully to the Ottomans (or to the Turks)". On the contrary, if anything, the genocide should be used as further reason for discrimination of a positive kind for the Armenians. So, one should really look at the situation *before* the genocide. On that score, there are two features that may be deemed contradicting each other.

First, this region (and possibly certain regions that remain outside of the Armenian territory in the Sèvres Treaty, in other words, certain other regions of the *Vilayat-i Sitte*) is the historic Armenia. On the opposite side, there is the fact that the Armenians are a minority across the region, the Kurds and the Turks together forming the majority. At first sight, it seems that there are here two principles on national rights that seem to contradict each other. If historic claims are taken into consideration the whole region needs to be considered to belong to the Armenians. It cannot be said such claims are irrelevant. All other circumstances being equal, historical and cultural belonging may be relevant. But to draw from the premise that a region belonged historically to a people the conclusion that the region should belong automatically to the modern nation descending from that historic people opens a Pandora's box of erroneous and dangerous results. The most striking case is of course the Zionist thesis of Eretz Israel (the Promised Land) which bases its whole argument on ancient history. To give priority to historical arguments, in ignorance of the living population producing and making their living on that piece of the earth has never been a principle any Marxist has owned up. It is for this reason that, provided that it takes place under conditions of full freedom, a referendum has always been considered, despite all its limitations, to be the best and the most democratic method to decide what a region opts for in the self-determination of the territory in question. No one has witnessed churches and mosques, sepulchres and cemeteries vote in a referendum, not the dead!

One conclusion to be drawn from all this is the following: The struggle of the

population in the Eastern provinces of Anatolia to keep these provinces as part of the Ottoman or (after the republic came into being) Turkish state and to prevent the formation of an Armenia cannot be considered to be identical to genocide. The Great War is over. It is no longer meaningful to continue the policy of revolutionary defeatism.

We cannot look at the movement in Eastern Anatolia that tried to wage this struggle (a movement that was part and parcel, indeed lay at the origin, of the Ankara movement itself) as a totally just or totally unjust movement. The war between the Ankara movement and the independent Armenia established by the Dashnak between 1918 and 1920 is one in which the interests of two bourgeois nations clash, one led by the Ankara movement based on the more modern ruling classes in the west of the country and the feudal ruling classes of the Kurdish east, the other led by the formerly socialistic (in the peasant sense) Dashnak that turned into a counter-revolutionary party after 1918.

Viewed from the Turkish side, it cannot be said it is as serious a defence of the fatherland as what was at that time being done in the west of Turkey. When viewed from the Armenian side, it is a struggle that may be seen as just because it was being waged by the other half of the nation that had been subjected to genocide, but as unjust when it was a matter of relative population sizes. There is also a contradictory situation when one considers the war in its national and class aspects. Seen through the national point of view, the war seems more just for Armenians. But on the other hand, when viewed from a class perspective, we find the Armenian side being led by a government that is decidedly counter-revolutionary, while the Ankara government is a close ally of Soviet Russia. So, this is a very complex situation. The fact that it came to an end through the timely Sovietisation of the Southern Caucasus is one of the most felicitous events of this period full of massacres and disasters!

It might, nonetheless, be open to discussion whether the frontiers that came out of the negotiations were just or not. And not only the frontiers. It is debatable whether in the region that extends from the Eastern Anatolian plateau to Eastern Armenia in the Caucasus the national question should be solved on the basis of two (or if Azerbaijan is included) three nation states. To say that historical arguments should be taken into consideration only after the needs of the current-day generations alive is not necessarily to say that many places, among which the Ararat Mountain (of such historic symbolism for the Armenians) or the site of the historic city of Ani should be Turkish territory.

Let us assume for a moment that proletarian revolution is triumphant in this entire region. The most meaningful solution will be found through a thoughtful negotiation of all sides concerned (in this case at least two, the Armenians and the Turks) and at most four (bringing in the Azeris and the Kurds). We will return to these matters when we are discussing questions relating to programme and strategy below.

Before leaving behind this aspect of the matter, let us touch upon a final question of some importance. During the Armistice years (1918-1922), the Armenians who sought a solution to the question of their national rights in their support for the French occupation forces made a great mistake. It was totally legitimate for the Turkish population of those regions to stand up against French imperialism. The

fact that the Ankara movement also supported this resistance on the part of the people of the region is also meaningful. It is true that the Armenians are an injured people. It is also true that they are trying to retrieve their property. But to take shelter behind an occupying imperialist power in search of one's national rights is not justifiable. One cannot fight an injustice through the creation of an even greater injustice.

## **12. Questions of programme and strategy**

Marxism does not theorise or research out of a motive of curiosity. Its aim is to change the world in the direction of the emancipation of labour and the oppressed. In this endeavour, it strives to discover the laws behind daily occurrences and to comprehend the essence behind phenomena. This knowledge makes it possible to develop predictions for the future. Programme and strategy rise on the ground laid by this entire process.

What we tried to do in this article was to analyse the Armenian genocide on historical materialist bases and understand it through the mutual positioning and struggle of classes. We were able to reach certain explanations and conclusions. Now it is time to provide a synthesis of all this from the angle of programme and strategy.

Let us first remind the reader that we have repeated as a leitmotif the policies adopted by our mentor the Bolshevik Party from the early 20<sup>th</sup> century on again and again. When we took up the historical formation of the Armenian revolutionary movement, we intimated that there was a problem with the Bolshevik policy on the Armenian question. We later tried to elaborate on this in the section on the political assessment of the genocide: Caucasian Bolshevism under the leadership of Shaumian did not show any interest in the Armenian national question even if from an explicitly non-nationalist perspective.

For this reason, when the Armenian genocide descended on Western Armenia, Shaumian and his comrades are helpless because organising among Anatolian Armenians has never come on their agenda. Later we explained that there was a weakness in the formation of the Baku Commune consisting of the distance the Azeri urban poor and peasants kept to the Armenians and Bolsheviks, that more importantly the collapse of the Commune was directly predicated on the vicissitudes of the Armenian question, that, confronted with the approach of the armies of Halil Pasha, the Dashnak abandoned the Soviet camp in favour of the British camp.

Proceeding from all this we can now ask the following question: Within the framework of the Bolshevik policy for the Caucasus, first, would it not have been better had the Armenian national question been taken more seriously? And, secondly, was it not a missing link in the Bolshevik policy not to have developed priorly a policy to deal with these national frictions, related as these were to the Armenian question as well.

Regarding the first point, we need to recall that when Bolshevism started its organising drive in the Caucasus, the 1894-1896 massacres were there for everyone to see. The Ottoman state had intentionally put to the sword hundreds of thousands

of Armenians! This had already shown even before the onset of the 20<sup>th</sup> century how burning was the Armenian question. Who could have guaranteed that a problem of such gigantic dimensions would not spill over to Russian Armenia itself in the near future? When a fire starts in a neighbour's house, everyone immediately thinks whether it will carry over to their own house. It is difficult to understand that such a problem should not have found its way, and this in a priority manner, to the agenda of Armenian Bolsheviks. To learn from comparison with a hypothetical example, can anyone imagine Kurdish parties remaining aloof to what is happening in the other parts of Kurdistan?

This is not all. The Leninist conception of internationalism is not abstract, as opposed to that of Rosa Luxemburg, for instance.<sup>49</sup> It includes within itself, in dialectical manner, the national liberation of oppressed nations as an inseparable element.<sup>50</sup> The fact that Caucasian Bolshevism excluded the Armenian national question from its programme and strategy means turning its back on the Ottoman Armenian, whose predicament of harsh oppression had already come out clearly in the last third of the 19<sup>th</sup> century. Let us explain this in a different manner: when struggling against nationalist socialists in Poland, Rosa Luxemburg erred because she did this by choosing to ignore the question itself. The emergence of a unified Poland as a result of the unification of the three parts at the end of World War One was a practical refutation of Luxemburg's approach to the question. The alternative to a **nationalist** approach to the national question is not to overlook that question. The alternative is to approach a veritable national question in an **internationalist** manner. The fact that while Lenin defined the duty of the socialists of the oppressor nation as the recognition of the right to self-determination of the oppressed nation, he attributed, asymmetrically, the duty of defending unity between the oppressor and the oppressed nations was a consequence precisely of this internationalist outlook. In other words, Rosa Luxemburg should not have denied the veracity of the national question in Poland, but should have explained to the Polish working class that the national question could be solved in a context of unity with Russia. She should not have turned her back on the national question itself.

The same is true of Caucasian Bolshevism. The fact that Shaumian and his comrades turned their backs on the national question to concentrate exclusively on class struggle engendered very adverse results. (1) Because the Armenian national question was (and is) a veritable national question, the Armenians remained aloof on Bolshevism outside of the large cities and organised in petty-bourgeois socialist parties. (2) Caucasian Bolshevism remained helpless when confronted with the catastrophe experienced by the Anatolian Armenians. (3) Turning one's back to the national question also prevented intellectual and practical work on the question of what concrete policies would be helpful in overcoming national (at times nationalist) divisions between the diverse peoples who lived in the Caucasus in an intertwined

49 For a comparison of the approaches of these two great Marxists to the national question, see our *Kod Adı Küreselleşme. 21. Yüzyılda Emperyalizm* [Code Name Globalisation. Imperialism in the 21<sup>st</sup> Century], Enlarged 3<sup>rd</sup> Edition, Istanbul: Yordam Kitap, 2011, pp. 318-346.

50 For the entire theoretical framework of Lenin's approach to the "question of nations" as we call it, see our "Lenin as Alternative", *Revolutionary Marxism* 2024.

manner.

It may be said that at the basis of the oversight of Caucasian Bolshevism with respect to the Armenian national question lies the over-generalisation of Lenin's principle, already touched upon above, of the defence of unity with the oppressor nation as the duty of Marxists of the oppressed nation. This principle cannot and should not be applied to every case. If it is, the socialists of a country are dutybound to organise under the roof of the same party in a multinational country. But if unity will not be defended for some nation, then the communist party of the oppressed nation should be organised independently. For the revolutionary party is the nucleus of revolutionary power, it is a candidate for ruling the government. If a separate state is going to be defended, then there needs to be a separate party of that nation.

Even in those situations in which a separate state will not be defended, if the oppressed nation has other parts spread out in neighbouring countries, (the pre-unification Poland, today's Kurdistan etc.), the unified communist party of the country has to concern itself with the other (cross-frontier) parts of that oppressed nation. That nation has to be in a position to be free to establish certain autonomous governmental structures if the necessity arises, and the International to which the unified communist party belongs to needs to deliberate on this question extensively. The cost will be truly great if all this is not heeded.

Moreover, this is a corollary of proletarian internationalism. Whereas proletarian internationalists have put their heart and mind into spreading the fire of revolution to different climes and peoples of the world, how is it possible for them to remain indifferent to the problems experienced by their national kin, even if the programmatic objective does not (yet) stipulate a unification for that oppressed nationality?

At the basis of all this lies the refusal by Lenin of federal forms before the October revolution, the fact that although he defended the right of nations to self-determination unswervingly, once this right has been utilised and separation shunned, an absolute sway of the central state would be the rule. The same Lenin saw, after the revolution, that federalism is the only way forward in resisting the socialism of the oppressor nation and struggled with supra-human energy, even in his sick bed, to see to it that the Union of Soviet Socialist Republics was established in compliance with the federal principle supreme.<sup>51</sup>

Here comes in the second question, which is also of great actuality. Debates on programme and strategy cannot be confined to the past. The conclusions with respect to the present and the future should definitely be drawn. The second issue that we raised when we were talking about the two problems in its approach to the Armenian question is of burning actuality. What methods are to be used in solving the historic contradictions between the peoples of the Caucasus? How and through what concrete policies will internationalism be given flesh and bone in the region? We criticised above Caucasian Bolshevism for not having done this. We may now broaden our perspective.

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<sup>51</sup> On this question see V. I. Lenin & Leon Trotsky, *Lenin's Fight Against Stalinism*, 2<sup>nd</sup> Edition, New York: Pathfinder Press, 1986, pp. 127-149.

Let us make a general observation: whenever there is a revolutionary upsurge in the wider geography within which the Caucasus is embedded (say Eurasia), this ends up as national massacres inside the Caucasus. Let us elaborate on this.

In 1905, when the whole of Czarist Russia was being shaken by the forward leap of the revolution, The Southern Caucasus witnessed a mutual massacre! In the months following the 1917 revolution, the revolutionary banner raised by the Baku Commune (in 1918) in the Southern Caucasus was again soiled by the struggles between the Azeri and the Armenian. Nakhchivan and Nagorno Karabagh constantly created frictions between the two nations in the early period of the Soviet Union. When the Gorbachev reforms led to a thaw in political life, the successive events of Sumgait, Khojaly, and Nagorno Karabagh turned the Southern Caucasus into a tinderbox. The tinderbox has erupted again and again recently and veritable wars have been waged between Armenia, on the one side, and Azerbaijan and Turkey, on the other. The Armenian-Azeri tension is still covering up all other types of political questions in the Southern Caucasus.

At this point, we can pass on to Anatolia. We mentioned above how the mutual claims between the two sides in the face of the historic fact that Eastern Anatolia was Western Armenia rendered any solution to controversies more difficult. Since the Azeris are a people that claim Turkic pedigree, these tensions bear a certain continuity with the debate in Southern Caucasia or, even more, they are integrated into that debate. If no Turkish government was able to improve Turkey's relations with Armenia in the last four decades, there is behind this, to only a certain extent, of course, the fact that the Azeri-Armenian conflict stays the hand of Turkish governments. But in Anatolia the question does not remain a Turkish-Armenian tension. At least in part, the territory that the Armenians claim as their fatherland is also considered as their fatherland by the Kurds. In other words, there is a triple claim on one and the same territory and they all contradict each other.

Under these circumstances, the national question along the line that connects Anatolia and the Caucasus can only be solved on the basis of the defence of a federation. It is not possible to reach a just, durable and stable solution regarding the national contradictions between the Turk (and the Azeri), the Armenian, and the Kurd that are a legacy from the depths of history on the basis of independent nation states. As the massacres and struggles that have been going on for longer than a century, at least from 1894-1896 on, show, these contradictions are of a strategic kind. The debate on the Armenian genocide is not simply an ethical question (although there is that aspect as well). It is a necessary debate if tomorrow's revolution is to be triumphant in Anatolia and the Caucasus. It is a debate on programme and strategy.

We thus see the solution to the question that posed the most difficult of assessments in the context of this article, that is, the evaluation of a correct position on the Eastern Front (between Armenia and Turkey), emerge on the horizon. In the aftermath of the great massacre that Anatolia went through, what should have been done was to create a state organisation, in the form of a federation, that would provide every people the possibility of the guarantee of its safety and security. It would be the Turks to hold state power in Adana and the Armenians in Sis and Zeytun. These fine details would only be arranged in a just manner on the basis of honest negotiations

between the communist governments of the entire region. These are all details. What is important is the principle of federation.

We do have a precedent here. This programme was defended for the proletariat of Turkey by the Communist Party of Turkey, which was founded in Baku on 10 September 1920 in its capacity of the Turkish section (or “section in Turkey”, if that is more desirable) of the Communist International. This party under the leadership of Mustafa Suphi was pursuing the goal, on the one hand, of joining forces with the Ankara government in the latter’s struggle against the imperialist occupation and that of its proxies, but, on the other hand, as opposed to the Ankara government it defended, in its programme, the federation form if this proved necessary for granting the legitimate rights of all the other peoples living on Anatolian soil. How lucky are the communists of Turkey for inheriting the legacy of the original Communist Party of Turkey!

Unfortunately, the leadership of this party, Mustafa Suphi and 14 of his leading comrades were murdered by the agents of the Turkish bourgeoisie on the night of 28-29 January 1921. It is appalling to see that the fates of Mustafa Suphi and Stepan Shaumian turned out to be so similar. The murder of these two leaders by reactionary forces, along with their leading comrades, symbolises, in our opinion, the elimination of the conditions for the resolution of the Turco-Armenian question in the course of the 20<sup>th</sup> century.

The Stepan Shaumians and the Mustafa Suphis of the 21<sup>st</sup> century will again assume the leadership of the revolutionary proletariat and see to it that the two peoples live together again as they did for centuries. But not as *millet-i hâkime* and *millet-i sâdıka* this time! They will make it possible for the two peoples to embrace each other under conditions that will leave no space for the oppressor and the oppressed.

To work day and night to arrive at this condition is the best apology to be addressed to the victims of the Armenian genocide.

# Political Marxism: A Refutation

Alp Yücel Kaya

## Introduction

Political Marxists used to focus on England to discuss the origins of capitalism and/or capitalist development; in recent years they enlarged the geographical spectrum and launched case studies to continue to do so in order to claim a universal character for their theoretical argument.<sup>1</sup> They resume their theoretical starting point as well as their critical perspective towards the Marxist literature examining capitalist development and bourgeois revolutions as follows:

Marx's early work, and especially the *German Ideology* and the *Communist Manifesto*, accepted the narrative of historical development promoted by liberal historians and political economists. With the *Grundrisse* and *Capital*, however, Marx broke with the liberal paradigm, offering a radical critique of classical political

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<sup>1</sup> Charles Post, *The American Road to Capitalism, Studies in Class-Structure, Economic Development, and Political Conflict 1620-1877*, Brill, 2011; Xavier Lafrance and Charles Post (eds.), *Case Studies in the Origins of Capitalism*, Springer International Publishing, Palgrave Macmillan, 2019; Xavier Lafrance, *The Making of Capitalism in France, Class Structures, Economic Development, the State and the Formation of the French Working Class, 1750-1914*, Brill, 2019; Eren Düzgün, *Capitalism, Jacobinism and International Relations, Revisiting Turkish Modernity*, Cambridge University Press, 2022; Xavier Lafrance and Stephen Miller, *Transition to Capitalism in Modern France, Primitive Accumulation and Markets from the Old Regime to the Post-WWII Era*, Brill, 2024; Javier Moreno Zacarés, *Residential Capitalism, Rent Extraction and Capitalist Production in Modern Spain (1833-2023)*, Routledge, 2024.

economy's notion of 'primitive accumulation' as the gateway to capitalism.<sup>2</sup> For nearly eight decades after the publication of the first volume of *Capital*, the theorists of the Second and Third International ignored, for [the] most part, the "late Marx's" account of the origins of capitalism. The discussion of the origins of capitalism after Marx reverted back to his earlier formulations was based on Smith's version of the "commercialization model". Most post-Marx discussions (Plekhanov, Kautsky, Lenin, Trotsky, etc.) of revolutions in the less developed regions of the world—initially Tsarist Russia and later the Global South as a whole—revolved around whether or not the "bourgeois-democratic revolution" had been completed in these areas. While drawing radically different strategic conclusions about the possibilities and limits of working class struggles in these societies, all of the participants in the discussion assumed key elements of the "commercialization model". All embraced the vision that capitalism had developed in the urban 'interstices' of the feudal (or other pre-capitalist societies), diffusing to the countryside with the growth of markets, setting the stage for a "bourgeois-democratic" revolution which would destroy the remnants of pre-capitalist social relations through a radical land reform, parliamentary democracy and (where necessary) the achievement of national independence.<sup>3</sup>

This periodization in the works of Marx and subsequent differentiation by his "young" and "mature" works has such an important place that Political Marxists prefer to call themselves "*Capital*-centric Marxists." In this article, we do not focus on Political Marxists' or *Capital*-centric Marxists' exposition of the origins of capitalism; rather, we focus on their starting point, which serves as a theoretical basis in their exposition of the origins of capitalism, that is, periodization and differentiation of Marx's works and their immediate corollary, repudiation of bourgeois revolutions by Political Marxism.

Within these limits, let us first enumerate our objections to Political Marxists: first we argue that the perspective of historical materialism that "young" Marx developed did not follow Adam Smith ("commercialization model" or four-stage theory of history) as Political Marxists argued but rather the German Historical School of Law; Marx's critical perspective led however him to supersede and conserve the formulations of the historical school of law as his critique of political economy superseded and conserved the formulations of the classical economists. By emphasizing maturation in the form of continuity and not rupture in Marx's works, we assert that thinking about the French Revolution led him to formulate the basic premises of the theory of permanent revolution and the theory of uneven and combined development. We do not concur with the view that Marx accepted the narrative of historical development promoted by bourgeois historians, as Marx's relationship with bourgeois historians is analogous to his relationship with bourgeois economists. His approach to historical materialism is founded on the critique of bourgeois historians. Furthermore, to reduce the concept of the bourgeois revolution, which gained prominence with Marx, to a simple struggle between the two classes

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<sup>2</sup> Lafrance, *The Making of Capitalism in France*, p. 4-5.

<sup>3</sup> Xavier Lafrance and Charles Post, "Introduction", in *Case Studies in the Origins of Capitalism* ed. by Xavier Lafrance and Charles Post, Springer International Publishing, Palgrave Macmillan, 2019, p. 9.

(bourgeoisie-aristocracy) is to adopt a limited perspective when examining Marx's work. Indeed, Marx considered the struggles of the working people, *sans culottes*, *bras-nus*, and *Enragés* in his analysis of the French Revolution. We also contend that post-Marx Marxists followed the "commercialization model" and consequently baptized "bourgeois revolution." As we shall observe, the concept of the bourgeois revolution that Lafrance and Post refer to here was constructed by nobody but by Plekhanov at the end of the 19th century in the context of the French Revolution. It cannot be asserted that this construction was taken over by Kautsky, Lenin and Trotsky; it has simply been the Mensheviks' linear interpretation of history constructed by Plekhanov.

In this article we first discuss the article of Robert Brenner, a prominent figure in Political Marxism, entitled "Bourgeois Revolution and Transition to Capitalism" which sets up for Political Marxists the above-mentioned starting theoretical point. We study then *The German Ideology* to unearth the theoretical basis of Marx's historical materialism and Marx and Engels' works on the 1848 revolutions to expose the place of class struggle in it. Secondly, we examine Marx's relationship with the liberal historians. After recalling his familiarity with the French Revolution, we analyze his references to bourgeois historians and demonstrate his critique of bourgeois historiography, which parallels his criticism of political economy. To illustrate this point, we focus on Augustin Thierry, whom Marx refers to as "the father of the class struggle," and investigate Marx's overlooked commentary on Thierry. Subsequently, we discuss the concept of the bourgeois revolution and its political implications in Plekhanov, who, in the post-Marx era, accorded Thierry a distinctive position and presented a simplified and formalized account of historical materialism. In the concluding section we evaluate Marx's contribution to historical materialism by identifying key sources, beyond the works of bourgeois historians, that he consulted regarding the French Revolution. Through this analysis, we aim to separate the wheat from the chaff by exposing some distortions of Political Marxists.

## Brenner's discussion of Marx's models on the transition to capitalism

The texts that establish the position of Political Marxism regarding periodization and differentiation of Marx's works originate from Robert Brenner.<sup>4</sup> While trying to separate the wheat from the chaff here, it would be useful to address Brenner's perspective that underlines the supposedly liberal perspective that young Marx followed and rejects the concept of the bourgeois revolution. This we do especially in order to root out approaches that feed Political Marxists.

The main problematic in Brenner's research agenda is to develop a universal

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<sup>4</sup> Robert Brenner, "Marx's First Model of the Transition to Capitalism", Bernard Chavance (ed.), *Marx en perspective. Actes du colloque organisé par l'École des hautes études en sciences sociales*, Paris, January 1983, Paris, EHESS, 1985, pp. 203-230; Robert Brenner, "Bourgeois Revolution and Transition to Capitalism", A.L. Beier, D. Canadine, J.M. Rosenheim (eds.), *The First Modern Society, Essays in English History in Honour of Lawrence Stone*, Cambridge: Cambridge University Press, 1989, pp. 271-304. Ellen Meiksins Wood, George Comminel, Benno Teschke, Charles Post and those referred to in the first footnote are other Political Marxists who built on these texts.

narrative of the transition to capitalism. Within this framework, in his earlier works he rejected the commercial model (Neo-Smithian) in the development of capitalism in Britain by comparing it with developments in Eastern Europe, and the demographic model (neo-Malthusian) with developments in France, emphasizing that class struggle was the determining factor in all three cases.<sup>5</sup> He subsequently extended this perspective to Catalonia, the Netherlands, and China.<sup>6</sup> However, his attempt to explain universal development dynamics based on the comparative method revealed that bourgeois revolutions have no impact on the transition to capitalism. Within this context, it is necessary to examine the origins of Political Marxism's rejection of the concept of the bourgeois revolution and to address Brenner's claim (in the context of the debate on the bourgeois revolution in Britain) that Marx's perspective of historical materialism developed in two distinct periods and in different ways.<sup>7</sup>

According to Brenner, there are two incompatible models on the transition to capitalism, both arising from Marx's work. The first is the model developed by Marx in *The German Ideology* and *The Poverty of Philosophy* and set out in *The Communist Manifesto*. The origin of this model, according to Brenner, is Adam Smith's theory of historical development (four-stage theory of history).<sup>8</sup> It is based on the self-development of the division of labor: the division of labor determines modes of subsistence, changing them as it develops; in other words, the division of labor determines the level of development of the productive forces, but it also develops with the expanding market, determining "the social relations of class and property." The transition from feudalism to capitalism is brought about by the development of world trade, which is constantly growing within the old feudal society, and the maturation of bourgeois society in the process.<sup>9</sup>

The second model is based on Marx's later works, *Grundrisse* and *Capital*, although he did not extensively expound upon them. The fundamental tenet of this model is the mode of production, elucidated by the concept of the "social-property relation," which facilitates and structures social reproduction. The transition from feudalism to capitalism emerges from the conflicted reproduction of the class of peasant producers who individually possess their means of subsistence, on the one hand, and the lordly ruling and exploiting class who reproduce themselves by

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5 Robert Brenner, "Agrarian Class Structure and Economic Development in Pre-Industrial Europe", *Past and Present*, vol. 70, no 1, 1976, pp. 30-75; Robert Brenner, "The Origins of Capitalist Development: A Critique of Neo-Smithian Marxism", *New Left Review*, no 104, 1977, pp. 25-92; Robert Brenner, "The Agrarian Roots of European Capitalism" *Past and Present*, vol 97, no 1, 1982, pp. 16-113.

6 Robert Brenner, "The Rises and Declines of Serfdom in Medieval and Early Modern Europe", M. L. Bush (ed.), *Serfdom & Slavery: Studies in Legal Bondage*, Harlow: Longman, 1996; Robert Brenner, "The Low Country in the Transition to Capitalism", *Journal of Agrarian Change*, vol. 1, no 2, 2001, pp. 169-241; Robert Brenner and Christopher Isett, "England's Divergence from China's Yangzi Delta: Property Relations, Microeconomics, and Patterns of Development", *The Journal of Asian Studies*, vol. 61, no 2, 2002, pp. 609-662.

7 Brenner, "Bourgeois Revolution..."; "Marx's First Model...".

8 Brenner here follows the analysis of Ronald Meek in *Social Science and the Ignoble Savage*, Cambridge: Cambridge University Press, 1976.

9 Brenner, "Bourgeois Revolution...", p. 272.

extracting surplus from peasant producers through extra-economic compulsion, on the other. The primary objective of this model is to elucidate “the so-called primitive accumulation.” However, this happens not in the context of the accumulation of investment funds, as proposed by Adam Smith, but rather involves the dissolution of the fundamental social-property relations that constitute the feudal mode of production through a series of social processes, the transformation of feudal society by the feudal overlords’ loss of capacity to extract rent through extra-economic compulsion, and the peasants’ separation from their possession of the means of subsistence.<sup>10</sup>

Brenner posits that the first model, based on the growth of the division of labor, elucidates the self-development of bourgeois society and the dissolution of feudalism through the rise of trade and the growth of productive forces, thereby leading to the characterization of the English Civil War as a bourgeois revolution. He subsequently summarizes the causal relationship as follows<sup>11</sup>:

Schematically speaking, then, we get the following theory: the development of the productive forces determines the successive stages in the evolution of the mode of subsistence, in accord with the following causal chain: development of the productive forces → development of the division of labour (specialization and co-operation) → form of division between mental and manual labour → nature of class and property relations (distribution of material, instrument and product of labour) → form of state.<sup>12</sup>

Brenner proposes that Marx followed liberal historians in addressing the bourgeois revolution within the framework of this model:

Finally, in the *Communist Manifesto* and other works of the later 1840s, following lines initially laid out by liberal French historians of the early part of the nineteenth century – in particular, François Mignet, Augustin Thierry and François Guizot – Marx completed the foregoing schema with his notion of the bourgeois revolution *per se*. Thus, Marx has the bourgeoisie and absolute monarchy entering into alliance in the early modern period in order to destroy their common enemy, the parasitic feudal nobility. Then, as the bourgeoisie grew in strength, the absolute monarchy gravitated back toward the old nobility... What remained of feudalism was now effectively constituted by the absolutist state itself... The state’s absolutist levies constituted a fetter upon the bourgeoisie’s free enjoyment of its property and its development of the productive forces. The bourgeois revolution thus functioned to break these external political-parasitic barriers and to facilitate the continuation of the ongoing economic evolution.<sup>13</sup>

According to Brenner, however, in the mechanistically-deterministic theory

<sup>10</sup> Ibid, p. 272-273.

<sup>11</sup> Conversely, the second model addresses the limitations of the first model by emphasizing social-property relations, elucidating the specific aspect of capitalist development in England (through the evolution of agrarian capitalism) (ibid., p. 273). This discussion will not encompass the second model within the scope of our present topic. In the subsequent section, when examining the model, the reader is directed to the framework of the first model.

<sup>12</sup> Ibid, p. 276.

<sup>13</sup> Ibid, p. 278-279.

of transition posited by Marx's model there is in fact no room for a bourgeois revolution: the model starts from the development of bourgeois society in the towns, attributes the overcoming of feudalism to the development of trade, and the question of transition from one society to another does not exist, since bourgeois society develops on its own and leads to the dissolution of feudalism, a bourgeois revolution is hardly necessary.<sup>14</sup> Brenner argues that the root of this contradiction lies in the fact that Marx, in his historical studies of the 1840s, closely followed Adam Smith, who was fueled by the mechanical materialism of the 18th century Enlightenment.<sup>15</sup>

Brenner summarizes Adam Smith's historical analysis as follows: In Book 1 of *The Wealth of Nations*, Smith addressed the specialization of individuals driven by self-interest and their engagement in exchange relations (the division of labor and the development of the market), and in his earlier works he was one of the initial proponents of the four-stage theory of history. This progressive theory traces the historical evolution of modes of subsistence (from hunter-gathering to pastoralism, to settled agriculture and commercial society). Commercial society initially manifested itself in the ancient world but was disrupted by barbarian invasions, after which human nature was able to reassert itself, order was restored, and trade and towns flourished. In this context, Smith discovers a bourgeois revolution of his own. The towns and monarchy form an alliance against nobility; the towns are liberated from the burden of feudal control and levies, and they attain their freedom. With these obstacles removed, commercial society follows its natural development. In rural areas, nobles emancipate their servants to obtain money to cover increasing consumption. Some customary tenants on land are transformed into commercial farmers under competitive leases, while others are freed to migrate to cities. Consequently, trade establishes the absolute property of land by nobility and, ultimately, capitalist property relations.<sup>16</sup>

According to Brenner, it is evident that the historical materialist perspective developed by Marx in the 1840s aligns with the theoretical framework of Adam Smith. Both Smith and Marx conceptualize the historical evolution and dynamics of economic development in terms of competition and trade, as well as the subsequent expansion of the division of labor and the evolution of modes of subsistence. Smith's bourgeois revolution marked the inception of economic development through the alliance of urban classes and the monarchy against the nobility; for Marx, the classical bourgeois revolutions of the 17th and 18th centuries culminated this process. Nevertheless, in both theoretical frameworks, a revolution against feudal structures is deemed necessary for the development of urban industry. In the 1840s, influenced by liberal historians, Marx emphasized the significance of the medieval communal revolution in the development of bourgeois society.<sup>17</sup>

However, how did the four-stage theory of history and the concept of the bourgeois

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<sup>14</sup> Ibid, p. 280.

<sup>15</sup> Ibid, p. 280.

<sup>16</sup> Brenner, "Bourgeois Revolution...", p. 280-281.

<sup>17</sup> Ibid, p. 282-283.

revolution come together? Brenner underlines that Hume, whose connection with Smith is well known, had a strong influence on French liberal historiography (with which Marx was familiar), especially in terms of his originating of the idea of the bourgeois revolution.<sup>18</sup>

On the other hand, according to Brenner, in Marx's model, class and property relations depend on the development of the forces of production and the degree of development of the division of labor, so class relations and struggles are not independent, but rather dependent variables, playing a passive role. Therefore, Marx's narrative does not differ from that of Smith:

The crucial point, in this respect, is that Marx's understanding of the place of class and property relationship is, in these earlier works of his, explicitly *techno-functional*. Thus, the structure of roles within the labour process (co-operation within the unit) is technically determined by the nature of the productive process; in turn, the structure of roles within the labour process (co-operation within the unit), by virtue of its determining the division between mental and manual labour, itself constitutes the structure of class relations; as a result, the individuals who constitute classes do so by virtue of their occupation of technically-constituted roles within the labour process. The evolution of class and property relations is thus determined by the evolution of the labour process (co-operation within the unit). In consequence, despite appearances, class relations and class struggles occupy a passive and determined position, rather than an active and determining role, within Marx's early conception of historical evolution. Marx was, of course, at pains to bring out the nature of the class struggles which mark each stage of his evolutionary schema. But, in the end, these struggles are merely effects of the essential and inexorable development of the division of labour via the progress of the productive forces. For it is the development of the productive forces which, by virtue of its determining the growth of the division of labour, determines the evolution of class and property relations. By making class and property relations mere appendages of the division of labour, Marx ends up elaborating, rather than breaking from, Smith's historical materialism.<sup>19</sup>

At this stage, Robert Brenner appears to lack a comprehensive understanding of Marx's critique of political economy. Revisiting Sungur Savran's analysis, it is imperative to emphasize that Smith, by equating capitalist society with commercial society in the fourth stage within the framework of his four-stage theory of history, perceives and analyzes capitalism as a distinct mode of production with equivalent status to other modes of production. According to Savran, "[t]he error of political economy is that it starts out from the assumption that capitalist relations are *adequate to human nature* and therefore universal and eternal"<sup>20</sup>; in their view, other forms of productive activities and livelihood systems in the four stages have become obsolete due to their incongruence with human nature and inability to fulfill human potential. "The most striking outcome of this mentality is Adam Smith's

<sup>18</sup> Ibid, p. 283.

<sup>19</sup> Ibid, p. 284-285.

<sup>20</sup> Sungur Savran, "Critique of Political Economy" in Sungur Savran and E. Ahmet Tonak, *In the Tracks of Marx's Capital, Debates in Marxian Political Economy and Lessons for 21st Century Capitalism*, Palgrave MacMillan, 2024, p. 65.

eternalisation of capitalism by postulating that exchange is a precondition for the division of labour and is intrinsically tied to the innate inclinations of human nature.” However, the foundation of Marx’s critique of political economy rests on the treatment of capitalism not as a universal and eternal mode of production in accordance with human nature, but as a historically determined mode of production with a life process that is finite.<sup>21</sup>

Nevertheless, certain scholars, such as Ronald Meek, were able to interpret the four-stage theory of history of Smith (and other members of the Scottish Historical School such as Adam Ferguson, William Robertson and John Millar), along with Smith’s labor theory of value as the foundation of historical materialism. Brenner, drawing upon Meek’s work, also posited that Marx conducted an analysis following Smith’s methodology. As Savran observes, when viewed through the lens of Meek and Brenner’s interpretation, it appears that Adam Smith could be considered as a pre-Marxian Marxist.<sup>22</sup>

### Did Marx adhere to the four-stage theory of history?

At this point, we should raise the question: Did Marx indeed adhere to the four-stage theory of history?<sup>23</sup> To address this question, it is necessary to examine Norman Levine’s work, which provides a competent critique of Meek’s approach.<sup>24</sup> Levine posits that the intellectual origins of Marx’s historical materialism lie in the German Historical School of Law (and Barthold-Georg Niebuhr) rather than the Scottish Enlightenment. Although approaching the subject from a different angle, Levine, similar to Savran, emphasizes that Marx prioritizes the relations and mode of production over the division of labor and exchange in historical materialism. Marx’s analysis, which gives precedence to production over exchange, is evident in the following passage from *The German Ideology*:

Men can be distinguished from animals by consciousness, by religion or anything else you like. They themselves begin to distinguish themselves from animals as soon as they begin to *produce* their means of subsistence, a step which is conditioned by their physical organisation. By producing their means of subsistence men are indirectly producing their material life.

The way in which men produce their means of subsistence depends first of all on

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<sup>21</sup> Ibid, p. 66-67.

<sup>22</sup> Ibid, p. 65.

<sup>23</sup> In this context, it is important to emphasize that like us Nygaard, in a significant study on this topic (*History and the Formation of Marxism*, Palgrave MacMillan, 2022, p. 207-221), examines Marx’s relationship with bourgeois historians in the context of critical political economy but unlike us, he adopts the same position as Brenner regarding the four-stage theory of history. It is noteworthy that although both Neil Davidson and Alex Callinicos critique Brenner (and other Political Marxists), they concur with Brenner’s assessment of the impact of the four-stage theory of history on *the German Ideology* and Marx (see Neil Davidson, *How Revolutionary Were the Bourgeois Revolutions?*, Chicago: Haymarket Books, 2012, pp. 114 ff.; Neil Davidson, “How Revolutionary Were the Bourgeois Revolutions?”, *We Cannot Escape History: States and Revolution*, Chicago: Haymarket Books, 2015, p. 26; Alex Callinicos, “Bourgeois Revolutions and Historical Materialism”, *International Socialism*, no 43, 1989, p. 162).

<sup>24</sup> Norman Levine, “The German Historical School of Law and the Origins of Historical Materialism”, *Journal of the History of Ideas*, vol. 48, no 3, 1987, p. 431-451.

the nature of the means of subsistence they actually find in existence and have to reproduce.

This mode of production must not be considered simply as being the reproduction of the physical existence of the individuals. Rather it is a definite form of activity of these individuals, a definite form of expressing their life, a definite *mode of life* on their part. As individuals express their life, so they are. What they are, therefore, coincides with their production, both with *what* they produce and with *how* they produce. Hence what individuals are depends on the material conditions of their production.<sup>25</sup>

In this theoretical framework, the division of labor within a society characterized by production also encompasses a contradiction between individual interests:

Further, the division of labour also implies the contradiction between the interest of the separate individual or the individual family and the common interest of all individuals who have intercourse with one another. And indeed, this common interest does not exist merely in the imagination, as the “general interest”, but first of all in reality, as the mutual interdependence of the individuals among whom the labour is divided...

And finally, the division of labour offers us the first example of the fact that, as long as man remains in naturally evolved society, that is, as long as a cleavage exists between the particular and the common interest, as long, therefore, as activity is not voluntarily, but naturally, divided, man’s own deed becomes an alien power opposed to him, which enslaves him instead of being controlled by him.<sup>26</sup>

Property relations lie at the root of the contradiction of interests, so focusing on the relations and modes of production leads us to the relations and modes of property. This approach, which Brenner takes within the framework of the concept of “social-property relations,” can be clearly seen not only in *Grundrisse* and *Capital*, as Brenner argues, but previously in *The German Ideology*. According to Levine:

In Marx’s *German Ideology* (1845-46) the two basic premises of historical materialism were articulated for the first time: the contradiction of the means and mode of production, and the determining influence of the “form of ownership” upon an economic formation. Of the two basic premises, my remarks will be directed exclusively to the question of the “form of ownership.”<sup>27</sup>

Marx elucidates how modes of property determine social relations in *The German Ideology* as follows:

The various stages of development in the division of labour are just so many different forms of property, i.e., the existing stage in the division of labour determines also the relations of individuals to one another with reference to the material, in-

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25 Karl Marx and Frederick Engels, “The German Ideology, Critique of Modern German Philosophy According to Its Representatives Feuerbach, B. Bauer and Stirner, and of German Socialism According to Its Various Prophets (1845-1846)”, *Marx & Engels Collected Works (MECW)*, vol. 5, p. 31-32.

26 Ibid, p. 45, 46.

27 Levine, “The German Historical School...”, p. 433.

strument and product of labour.<sup>28</sup>

In this framework, Marx conceptualizes the first form of property as tribal property, extant at an underdeveloped stage of production; the division of labor is limited, comprising an extension of the natural division of labor within the family unit; the community consists of tribal chiefs, tribal members, and slaves. The second form of property is ancient communal and state property, which emerged when multiple tribes coalesced and established settlements in urban centers where slavery persisted. Concurrent with communal property (initially in movable property, subsequently in immovable property), private property also evolves. Class relations between citizens and slaves are relatively well-developed, as is the division of labor. The third form of property is feudal property or estate property, which, akin to tribal and communal property, is predicated on a community that is predominantly organized in rural areas; this community is opposed not by slaves, but by serf peasants in the countryside, and by the personal labor of the individual who dominates the journeymen with his own capital in the urban setting; there exists a dichotomy between urban and rural areas, accompanied by a limited division of labor.<sup>29</sup>

Levine emphasizes that Marx's historical materialist perspective in *The German Ideology*, as evidenced by the provided quotations, diverges significantly from the four-stage theory of history:

The four-stage theory differed from historical materialism because it was not an analysis of different "forms of ownership." Scottish conjectural history, following the tradition of natural jurisprudence, was basically concerned with property, either as flocks, lands, commodities, capital, and how these different stages of property produced laws which acted to preserve individuality and then political institutions, which were reflections of the private self and of its right to occupancy. A reading of the passage from *The German Ideology* indicates that Marx was concerned not with property but rather with various "forms of ownership" and how they influenced an entire economic formation. *The German Ideology* demonstrates that the focus of historical materialism was placed upon comparative economic anthropology, a study of several "forms of ownership" and how the relations of ownership imparted unique structures to different economic formations.<sup>30</sup>

However, what is the origin of this perspective, which focuses on the modes of property? Marx commenced his legal education at the University of Bonn in 1835 and subsequently continued at the University of Berlin in 1836. During this period, the University of Berlin was a center of jurisprudential controversy and debate. On one side, the philosophical school following Hegel, represented by Anton Friedrich Justus Thibaut, proposed universal and rational codification based on natural law theory, emphasizing historical and social ruptures exemplified by the French Civil Code of 1804. On the other side, Friedrich Karl von Savigny, since the 1810s, had led the historical school of law in opposition to the philosophical school. This

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28 Marx and Engels, "The German Ideology...", p. 32.

29 Ibid. p. 32-34

30 Levine, "The German Historical School...", p. 436.

approach sought origins of codification in the historical development of societies, traditions, customs, and beliefs, attributing particular significance to Roman law and advancing a historical understanding of law that underscored historical and social continuity. During his education, Marx initially aligned with the historical school before shifting towards the philosophical school, developing a critique from a Hegelian perspective.<sup>31</sup> Levine posits that Marx's Hegelian criticism, which he developed in the article "Philosophical Manifesto of the Historical School of Law," published in 1842, culminated in the criticism of idealism in *The German Ideology* in 1846. Subsequently, Marx distanced himself from Hegel and embarked on a materialist interpretation of history, paradoxically through the lens of the historical school of law.<sup>32</sup>

Within this theoretical framework, it is evident that Savigny's treatise on possession<sup>33</sup> constitutes the foundational text of the historical law school, which underpins Marx's emphasis on modes of property in *The German Ideology*. In this seminal work, Savigny primarily addresses the rights that emanate from possession rather than those that engender possession. Specifically, possession is examined in the context of interpersonal relationships rather than the relationship between persons and things. This analysis is conducted through the lens of the distinction between civil possession, possession, and natural possession in Roman property law, as well as the concepts of acquisition by prescription (*usucapio*) and interdiction, which pertains to the protection of possession. Savigny's conceptualization of possession is manifested in *The German Ideology*, albeit in a manner that both supersedes and conserves the original formulation:

The first form of property, in the ancient world as in the Middle Ages, is tribal property, determined with the Romans chiefly by war, with the Germans by the rearing of cattle. In the case of the ancient peoples, since several tribes live together in one city, tribal property appears as state property, and the right of the individual to it as mere "possession" which, however, like tribal property as a whole, is confined to landed property only. Real private property began with the ancients, as with modern nations, with movable property. (Slavery and community) (*dominium ex jure Quiritum*).—In the case of the nations which grew out of the Middle Ages, tribal property evolved through various stages—feudal landed property, corporative movable property, capital invested in manufacture—to modern capital, determined by large-scale industry and universal competition, i.e., pure private property, which has cast off all semblance of a communal institution and has shut out the state from any influence on the development of property. To this modern private property corresponds the modern state, which, purchased gradually by the owners of property by means of taxation, has fallen entirely into their hands through the national debt, and its existence has become wholly dependent on the commercial credit which the owners of property, the bourgeois, extend to it, as reflected in the rise and fall of government securities on the stock exchange.

31 Alp Yücel Kaya, "Genç Marx ve 'Odun Hırsızlığı Kanunu Tartışmaları'" ["Young Marx and 'Debates on the Law on Thefts of Wood'"], Sevinç Orhan, Serhat Koloğlu ve Altuğ Yalçınca (derl.), *İktisatta Bir Hayalet: Karl Marx*, İstanbul, İletişim Yayınları, 2012.

32 Levine, "The German Historical School...", p. 444.

33 Friedrich Karl von Savigny, *Traité de la possession d'après les principes du droit romain*, (transl. by Jules Beving) Société belge de librairie Hauman et comp., Brussels, 1840 [1803].

By the mere fact that it is a *class* and no longer an *estate*, the bourgeoisie is forced to organise itself no longer locally, but nationally, and to give a general form to its average interests. Through the emancipation of private property from the community, the state has become a separate entity, alongside and outside civil society; but it is nothing more than the form of organisation which the bourgeois are compelled to adopt, both for internal and external purposes, for the mutual guarantee of their property and interests.<sup>34</sup>

## **Is class struggle a dependent variable in Marx's perspective of historical materialism?**

Let us now put aside the claim that Marx's perspective of historical materialism follows the four-stage theory of history and look at Brenner's other claim that Marx recognized the class struggle as a dependent variable in the 1840s. Evidence from the Kreuznach notebooks indicates that Marx was studying and annotating a book written in 1818 by Jacques-Charles Bailleul<sup>35</sup>, a Jacobin-turned-Conventionist (following a line closely aligned with that of the Girondins), in which Bailleul (critiquing Germaine de Staël's work on the French Revolution) defends the Revolution.<sup>36</sup> Marx, in his analysis of Bailleul's book, delineates the distinctions between the property law of the feudal regime and the new property order established by the Revolution, interpreting this in terms of class struggle as follows:

Under the feudal system, land ownership was everything: its organization constituted the social order; it determined who was to command and who was to obey; you were free or slave, master or serf, lord, or villain, depending on whether you were born in the castle or next door; all rights were attached to property; and nothing to man. The first concession made to the serfs was a mortal blow to feudalism: it detached man, who was nothing, from the soil, which was everything. This first measure gave rise to the battle between feudalism and humanity: humanity demanded rights attributed exclusively to property. The Revolution judged this great trial; the result was that, instead of property having all rights over man, it was man who acquired all rights over property: from then on, the regime of reason or laws was substituted for the regime of feudalism. By a necessary consequence, the principle of order in society had to change its nature, just as rights had changed their place.<sup>37</sup>

The concept of class struggle is also addressed in *The German Ideology*, wherein Marx explicitly identifies the classes involved and posits this struggle as the driving force of history. In this context, it becomes evident that Marx does not set the bourgeoisie against the nobility, as Political Marxists think, but rather the serfs:

The production which these productive forces could provide was insufficient for

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34 Marx and Engels, "The German Ideology...", p. 89-90.

35 *Examen critique de l'ouvrage posthume de Madame de Staël ayant pour titre « Considérations sur les principaux événements de la Révolution française »*, Paris: chez Ant. Bailleul, 1818.

36 Claude Mazauric, "Aux sources de la connaissance par Marx de la Révolution française: note sur Jacques-Charles Bailleul, Conventionnel de la Seine-Inférieure et Historien de la Révolution", *Annales de Normandie*, vol. 39, no 2, 1989, p. 219- 229.

37 Quoted by Mazauric, "Aux sources ..." p. 226 from *MEGA (Marx-Engels-Gesamtausgabe)*, vol. 4, p. 2-63, 102-103, 166 (« Cahiers de Kreuznach », 1-5, 1843-1845).

the whole of society and made development possible only if some persons satisfied their needs at the expense of others, and therefore some—the minority—obtained the monopoly of development, while others—the majority—owing to the constant struggle to satisfy their most essential needs, were for the time being (i.e., until the creation of new revolutionary productive forces) excluded from any development. Thus, society has hitherto always developed within the framework of a contradiction—in antiquity the contradiction between free men and slaves, in the Middle Ages that between nobility and serfs, in modern times that between the bourgeoisie and the proletariat.<sup>38</sup>

In *The German Ideology*, Marx sees class struggle as the locomotive of history, but he also identifies differences in the rhythms of development and the resulting combination of old and new forms, that is, the dynamics of uneven and combined development<sup>39</sup>:

Thus all collisions in history have their origin, according to our view, in the contradiction between the productive forces and the form of intercourse. Incidentally, to lead to collisions in a country, this contradiction need not necessarily have reached its extreme limit in that particular country. The competition with industrially more advanced countries, brought about by the expansion of international intercourse, is sufficient to produce a similar contradiction in countries with a less advanced industry (e.g., the latent proletariat in Germany brought into more prominence by the competition of English industry).<sup>40</sup>

The clash of old and new forms also triggers the dynamics of the permanent revolution. It should also be noted that Marx's perspective of permanent revolution in the context of the developments in Germany in 1848 was inspired by the French Revolution. As Michael Löwy underlines, Marx and Engels, in their address to the Communist League in 1850, drew lessons from the 1789-1794 phase of the French Revolution and assigned the task of permanent revolution to proletarians in the German revolution<sup>41</sup>:

The first point on which the bourgeois democrats will come into conflict with the workers will be the abolition of feudalism. As in the first French Revolution, the petty bourgeois will give the feudal lands to the peasants as free property, that is to say, try to leave the rural proletariat in existence and form a petty-bourgeois peasant class, which will go through the same cycle of impoverishment and indebtedness which the French peasant is now still caught in. The workers must oppose this plan in the interest of the rural proletariat and in their own interest. They must demand that the confiscated feudal property remain state property and

38 Marx and Engels, "The German Ideology...", p. 431-432.

39 In Brenner's work, as in all Political Marxists' works, capitalism and pre-capitalism are like night and day. Pre-capitalism is dominated by extra-economic forces and capitalism by economic forces. Capitalism emerges as a result of class struggle, but there is no room for class transformations, the coexistence of old and new forms, or the leaps that class struggles give rise to. In this framework, we must say that we are faced with a linear reading of history that ignores the dynamics of uneven and combined development and permanent revolution.

40 Marx and Engels, "The German Ideology...", p. 74-75.

41 Mihael Löwy, "Marx et la Révolution française : la 'poésie du passé'", *Permanence(s) de la Révolution*, Paris: Éditions la Brèche, 1989, p. 245-246.

be converted into workers' colonies cultivated by the associated rural proletariat with all the advantages of large-scale agriculture, through which the principle of common property immediately obtains a firm basis in the midst of the tottering bourgeois property relations. Just as the democrats combine with the peasants so must the workers combine with the rural proletariat.<sup>42</sup>

As far as the workers are concerned, it is certain above all that they are to remain wage-workers as before; the democratic petty bourgeois only desire better wages and a more secure existence for the workers and hope to achieve this through partial employment by the state and through charity measures; in short, they hope to bribe the workers by more or less concealed alms and to sap their revolutionary vigour by making their position tolerable for the moment. The demands of the petty-bourgeois democrats here summarised are not put forward by all of their factions and only very few of their members consider these demands in their aggregate as a definite aim. The further individual people or factions among them go, the more of these demands will they make their own, and those few who see their own programme in what has been outlined above would believe that thereby they have put forward the utmost that can be demanded from the revolution. But these demands can in no wise suffice for the party of the proletariat. While the democratic petty bourgeois wish to bring the revolution to a conclusion as quickly as possible, and with the achievement, at most, of the above demands, ***it is our interest and our task to make the revolution permanent***, until all more or less possessing classes have been forced out of their position of dominance, the proletariat has conquered state power, and the association of proletarians, not only in one country but in all the dominant countries of the world, has advanced so far that competition among the proletarians in these countries has ceased and that at least the decisive productive forces are concentrated in the hands of the proletarians. For us the issue cannot be the alteration of private property but only its annihilation, not the smoothing over of class antagonisms but the abolition of classes, not the improvement of the existing society but the foundation of a new one.<sup>43</sup>

After all, “[t]he social revolution of the nineteenth century cannot draw its poetry from the past, but only from the future.”<sup>44</sup> In the face of the bourgeoisie’s highly probable betrayal, the revolution must undergo continuous development, radicalization, and deepening. Failure to do so may result in a “revolution from above,”<sup>45</sup> as evidenced by the developments in Germany, wherein the ascending bourgeoisie reconciles with the ruling classes of the old order and suppresses the working classes.<sup>46</sup> At this point, it would be prudent to consider Engels’ analysis of the evolution of the 1848 Revolution in France:

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42 Karl Marx and Friedrich Engels, “Address of the Central Authority to the League”, *MECW*, vol. 10, p. 284-285.

43 Ibid, p. 280-281 (our emphasis).

44 Karl Marx, “The Eighteenth Brumaire of Louis Bonaparte”, *MECW*, vol. 11, p. 106.

45 On the question of “revolution from above” or “passive revolution” we will take a brief look at Engels here, but in order to keep the subject on its main axis, we will content ourselves with referring to Gramsci: Antonio Gramsci, “Passive Revolution, Caesarism, Fascism”, in *The Antonio Gramsci Reader: Selected Writings, 1916-1935*, David Forgacs (ed.) with a foreword by Eric J. Hobsbawm, New York: New York University Press, 2000, p. 246-274.

46 Sungur Savran, *Türkiye’de Sınıf Mücadeleleri [Class Struggles in Turkey]*, vol. 1, 1908-1980, 5th edition, İstanbul: Yordam Kitap, 2022 [1992], p. 74-75.

[In France a] bourgeoisie split into two dynastic-monarchist sections [the Legitimists and the Orleanists], a bourgeoisie, however, which demanded, above all, peace and security for its financial operations, faced by a proletariat vanquished, indeed, but still a menace, a proletariat around which petty bourgeois and peasants grouped themselves more and more -the continual threat of a violent outbreak, which, nevertheless, offered absolutely no prospect of a final solution -such was the situation, as if made-to-measure for the coup d'état of the third, the pseudo-democratic pretender, Louis Bonaparte. On December 2, 1851, by means of the army, he put an end to the tense situation and secured Europe internal tranquility, only to confer upon it the blessing of a new era of wars. ***The period of revolutions from below was conducted for the time being; there followed a period of revolutions from above.***<sup>47</sup>

When Marx emphasizes in an article published on 15<sup>th</sup> of December 1848 in *Neue Rheinische Zeitung* the “secondary” nature of the March (1848) Revolution in Prussia in comparison to the French Revolution of 1789, through which was established the rule of German bourgeoisie that “developed so sluggishly, timidly and slowly,” “did not represent the interests of a new society against an old one, but renewed interests within an obsolete society” and “was inclined to betray the people and to compromise with the crowned representative of the old society”<sup>48</sup>, he is describing nothing but the second phase of revolutions that Engels would later (in 1895) describe as the “revolution from above.”

The Prussian March revolution [1848] was intended to *establish* nominally a constitutional monarchy and to *establish* actually the rule of the bourgeoisie. Far from being a *European revolution* it was merely a stunted after-effect of a European revolution in a backward country. Instead of being ahead of its century, it was over half a century behind its time. From the very outset it was a *secondary* phenomenon, and it is well known that secondary diseases are harder to cure and at the same time cause more harm than the primary diseases do. It was not a question of establishing a new society, but of resurrecting in Berlin a society that had expired in Paris.<sup>49</sup>

47 Friedrich Engels, “Introduction to Karl Marx’s *The Class Struggles in France 1848 to 1850* [1895]”, *MECW*, vol. 27, p. 512-513 (our emphasis).

48 “The German bourgeoisie developed so sluggishly, timidly and slowly that at the moment when it menacingly confronted feudalism and absolutism, it saw menacingly confronting it the proletariat and all sections of the middle class whose interests and ideas were related to those of the proletariat. The German bourgeoisie found not just one class *behind* it, but all Europe hostilely *facing* it. Unlike the French bourgeoisie of 1789, the Prussian bourgeoisie, when it confronted the monarchy and aristocracy, the representatives of the old society, was not a class speaking for the *whole* of modern society. It had sunk to the level of a kind of *social estate* as clearly distinct from the Crown as it was from the people, with a strong bent to oppose both adversaries and irresolute towards each of them individually because it always saw both of them either in front of it or behind it. From the first it was inclined to betray the people and to compromise with the crowned representative of the old society, for it itself already belonged to the old society; it did not represent the interests of a new society against an old one, but renewed interests within an obsolete society. It stood at the helm of the revolution not because it had the people behind it but because the people drove it before them; it stood at the head not because it represented the initiative of a new social era but only because it represented the rancour of an old one.” (Karl Marx, “The Bourgeoisie and the Counter-Revolution”, *MECW*, vol. 8, p. 162).

49 Ibid, p. 161-162.

Engels characterizes the Prussian Revolution of 1866 as a revolution from above that emerged in this new phase, emphasizing both external factors (the expansionist policy of France) and internal developments (the alliance of the bourgeoisie with the monarchy):

The reversion to the empire in 1851 provided fresh proof of the immaturity of the proletarian aspirations of that time. But it was itself to create the conditions under which they were bound to grow mature. Internal tranquility ensured the unfettered advancement of the new industrial boom; the necessity of keeping the army occupied and of diverting the revolutionary currents in an outward direction produced the wars in which Bonaparte, under the pretext of asserting the “principle of nationalities”, sought to secure annexations for France. His imitator, Bismarck, adopted the same policy for Prussia; he carried out his coup d’état, his **revolution from above**, in 1866, against the German Confederation and Austria, and no less against the Prussian *Konfliktskammer* [constitutional conflict].<sup>50</sup>

According to Engels, the issue does not lie in the revolutionary nature of the Prussian Revolution; rather, the concern is that it was insufficiently revolutionary, characterized as a revolution from above.

In short, it was a complete revolution, carried out with revolutionary means. We are naturally the last to reproach him for this. On the contrary, what we reproach him with is that he was not revolutionary enough, that he was no more than a Prussian **revolutionary from above**.<sup>51</sup>

To summarize our analysis of Brenner’s interpretation of Marx’s historical materialism, it is evident that Marx did not adhere to the four-stage theory of history and Adam Smith’s perspective, given the significance he attributed to both relations of production and property relations. Furthermore, Marx did not conceptualize class struggle as a dependent variable. However, an extensive elaboration on this matter may be unnecessary, as Marx was introduced to the four-stage theory of history after encountering Adam Ferguson’s *Essay on Civil Society* in 1847, subsequent to his composition of *The German Ideology*. Marx engaged with John Dalrymple and John Millar’s works in 1851 and 1852. He studied Adam Smith in 1843, but *The Wealth of Nations*, which he read that year, only briefly mentions the four-stage theory of history. According to Levine, Marx’s acquaintance with the theory occurred indirectly in 1844 and 1845 through the works of Charles Pecqueur and Simon Linguet in French publications that expounded upon the theory. However, Marx did not utilize the work of either scholar in the Paris Manuscripts or *The German Ideology*.<sup>52</sup> This suggests that Marx was neither familiar with nor inclined towards the four-stage theory of history. Consequently, the Adam Smith-influenced theory

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50 Friedrich Engels, “Introduction to Karl Marx’s The Class Struggles in France 1848 to 1850 [1895]”, *MECW*, vol. 27, p. 513 (our emphasis).

51 Friedrich Engels “The Role of Force in History [1887]”, *MECW*, vol. 26, p. 481 (our emphasis); Hal Draper, *Karl Marx’s Theory of Revolution, vol. 1, The State and Bureaucracy*, New York: Monthly Review Press, 1977, p. 427.

52 Levine, “The German Historical School...”, p. 435.

of history, which Brenner characterizes as Marx's initial theory of history, loses its validity. Within this framework, Marx does not follow bourgeois historiography, but rather develops a critical perspective. In our assessment, if a distinction is to be made in Marx's theory of history, it is that the historical materialist perspective that matured in Marx during the 1850s-1860s was emerging in his works of the 1840s.

## French Revolution and Marx

Let us look at what Marx had to say about the British and French revolutions. In his article "The Bourgeoisie and Counter-Revolution," the second part of which was published in the *Neue Rheinische Zeitung* on December 15, 1848, Marx evaluates the British and French revolutions from a historical perspective, emphasizing the bourgeois nature of both in a manner that diverges from Political Marxists' simplified interpretation:

In 1648 the bourgeoisie was allied with the modern aristocracy against the monarchy, the feudal aristocracy and the established church.

In 1789 the bourgeoisie was allied with the people against the monarchy, the aristocracy and the established church.

The revolution of 1789 (at least in Europe) had as its prototype only the revolution of 1648; the revolution of 1648 only the revolt of the Netherlands against Spain. Both revolutions were a century in advance of their prototypes not only in time but also in content.

In both revolutions the bourgeoisie was the class that *really* headed the movement. The *proletariat* and the *non-bourgeois strata of the middle class* had either not yet any interests separate from those of the bourgeoisie or they did not yet constitute independent classes or class sub-divisions. Therefore, where they opposed the bourgeoisie, as they did in France in 1793 and 1794, they fought only for the attainment of the aims of the bourgeoisie, even if not *in the manner* of the bourgeoisie. *All French terrorism* was nothing but a *plebeian way of dealing with the enemies of the bourgeoisie*, absolutism, feudalism and philistinism.

The revolutions of 1648 and 1789 were not *English* and *French* revolutions, they were revolutions of a *European* type. They did not represent the victory of a *particular* class of society over the *old political order*; they *proclaimed the political order of the new European society*. The bourgeoisie was victorious in these revolutions, but the *victory of the bourgeoisie* was at that time *the victory of a new social order*; the victory of bourgeois ownership over feudal ownership, of nationality over provincialism, of competition over the guild, of the division of land over primogeniture, of the rule of the landowner over the domination of the owner by the land, of enlightenment over superstition, of the family over the family name, of industry over heroic idleness, of bourgeois law over medieval privileges. The revolution of 1648 was the victory of the seventeenth century over the sixteenth century; the revolution of 1789 was the victory of the eighteenth century over the seventeenth. These revolutions reflected the needs of the world at that time rather than the needs of those parts of the world where they occurred, that is England and France.<sup>53</sup>

However, Marx and Engels emphasize only the French Revolution as a classic bourgeois revolution:

<sup>53</sup> Karl Marx, "The Bourgeoisie and the Counter-Revolution", *MECW*, vol. 8, 2010, p. 161.

The great French Revolution [after the Protestant Reformation and Calvinism in Germany] was the third uprising of the bourgeoisie, but the first that had entirely cast off the religious cloak, and was fought up to the destruction of one of the combatants, the aristocracy, and the complete triumph of the other, the bourgeoisie. In England the continuity of pre-revolutionary and post-revolutionary institutions, and the compromise between landlords and capitalists, found its expression in the continuity of judicial precedents and in the religious preservation of the feudal forms of the law. In France the Revolution constituted a complete breach with the traditions of the past; it cleared out the very last vestiges of feudalism, and created in the *Code Civil* a masterly adaptation of the old Roman law – that almost perfect expression of the juridical relations corresponding to the economic stage called by Marx the production of commodities – to modern capitalistic conditions.<sup>54</sup>

So, where did Marx obtain his information on the French Revolution while making these evaluations? Perhaps the first thing to be said is that Marx did not only read books about the French Revolution. For this reason, it will be useful to briefly follow Jean Bruhat and evaluate Marx and his environment in the context of the French Revolution. Marx was born in 1818; individuals born in 1794 were 25 that year, while Saint-Just would have been 51. Filippo Buonarroti, comrade of Gracchus Babeuf, published *La Conspiration pour l'Égalité* in 1828 and passed away in 1837, coinciding with Marx's completion of his first year at the University of Berlin. Due to his generation, Marx was temporally proximate to the Revolution and its participants. Furthermore, the Rhineland, Marx's birthplace and upbringing, was under French rule from 1794 to 1814, encompassing both the Revolutionary and Imperial periods, with his birthplace Trier serving as the seat of the French *département* of Sarre. When the French Revolution of 1830 came to the fore, the people of Rhineland had nothing on their mind but 1789. The atmosphere in his family, as well as in high school in Trier, was predominantly francophone. While studying at university in Berlin, he sought to navigate between two distinct schools of law: one emphasizing universal and rational codification that underscored the historical and social ruptures produced by the French Revolution, and another focusing on historical codification that emphasized historical and social continuities based on customs, traditions, and beliefs in the historical development of societies. The young dissidents of the 1830s and 1840s, including Marx, organized around Hegel and his thoughts, whose admiration for the French Revolution was well-known. It was precisely in such a context, where the Revolution was decisive, especially in 1843-1844, that Marx engaged with the historiography of the French Revolution, conducted research in libraries, and carried out political work during his time in Paris.<sup>55</sup>

We also know that Marx's Kreuznach and Paris manuscripts of 1843-1844

54 Friedrich Engels, "Introduction to the English Edition (1892) of Socialism: Utopian and Scientific", *MECW*, vol. 27, s. 294.

55 Jean Bruhat, "La Révolution française et la formation de la pensée de Marx", *Annales historiques de la Révolution française*, no 184, 1966 (Special Issue: La pensée socialiste devant la Révolution française), p. 129-134.

contain his reading and analysis notes on the French Revolution, and that he was planning to write a book on the history of *La Convention* (the Constituent Assembly that ruled from the proclamation of the Republic in 1792 until the *Directoire* in 1795 and gave its name to this period), for which he postponed writing *Critique of Hegel's Philosophy of Right* for a while. Moreover, Marx notes in his article “Critical Marginal Notes on the Article ‘the King of Prussia and Social Reform. By a Prussian’” published in the *Vorwärts!* of August 7 and 10, 1844, that “the Convention represented the *maximum of political energy, political power and political understanding*”.<sup>56</sup>

## Bourgeois historians and Marx

Political Marxists state that Marx borrowed the narrative of historical development, namely the bourgeois revolution, promoted by liberal historians. A similar view has been expressed in some studies discussing the place of the French Revolution in Marx’s intellectual development (mostly emphasizing the other side of the bourgeois revolution coin: class struggle).<sup>57</sup> The common references of these studies are the relevant passages in Marx’s letters to Joseph Weydemeyer and Friedrich Engels. It would be useful to review them together.<sup>58</sup> In his letter to Communist League member Weydemeyer dated March 5, 1852 (London to New York), in which he emphasizes classes, class struggle, and the historicity of this struggle, Marx says that the idea of class struggle was put forward by bourgeois historians before him:

Now as for myself, I do not claim to have discovered either the existence of classes in modern society or the struggle between them. Long before me, bourgeois historians had described the historical development of this struggle between the classes, as had bourgeois economists their economic anatomy.<sup>59</sup>

In the same letter, he emphasizes that just as reading Ricardo is essential for the critique of political economy, reading bourgeois historians is also necessary to

<sup>56</sup> Quoted by Bruhat, “La Révolution française...”, p. 128 from Karl Marx, *Œuvres philosophiques*, vol. 5, Editions Alfred Costes, 1937, p. 213-214. Moreover, the first article of Marx’s “Draft Plan for a Work of the Modern State”, presumably prepared in November 1844, is “The *history of the origin of the modern state or the French Revolution*” (Karl Marx, “Draft Plan for a Work on the Modern State”, *MECW*, vol. 4, p. 666).

<sup>57</sup> For example, Eric Hobsbawm writes: “In fact, as Marx himself freely acknowledged, these were the men from whom he derived the idea of the class struggle in history. They were essentially historians of their own times. François Guizot was twenty-eight years old when Napoleon was sent to Saint Helena, Augustin Thierry was twenty, Adolphe Thiers and F.A. Mignet nineteen, and Victor Cousin twenty-three.” (Eric J. Hobsbawm, *Echoes of the Marseillaise: Two Centuries Look Back on the French Revolution*, New Jersey: Rutgers University Press, 2019 [1990], p. 8). For other examples, see Julien Louvri r, and Jean-Numa Ducange.

<sup>58</sup> There are still other authors that use the same quotations but discuss them in the context of Marx’s readings of the French Revolution rather than the concept of bourgeois revolution or the circulation of the idea of class struggle: Jean Montreau, Jean Bruhat, Auguste Cornu, Albert Soboul, Raphael Samuel, Claude Mazauric, Neil Davidson, Jean-Numa Ducange, Bertel Nygaard, Isabella Consolati.

<sup>59</sup> *MECW*, vol. 39, p. 62.

develop a critical position, and he names a few of them:

Finally, if I were you, I should tell the democratic gents *en général* that they would do better to acquaint themselves with bourgeois literature before they venture to yap at its opponents. For instance they should study the historical works of Thierry, Guizot, John Wade and so forth, in order to enlighten themselves as to the past ‘history of the classes’. They should acquaint themselves with the fundamentals of political economy before attempting to criticise the critique of political economy. For example, one need ... open Ricardo’s magnum opus...<sup>60</sup>

Engels adds François Auguste Marie Mignet to this list:

If it was Marx who discovered the materialist view of history, the work of Thierry, Mignet, Guizot and every English historiographer prior to 1850 goes to show that efforts were being made in that direction, while the discovery of the same view by Morgan shows that the time was ripe for it and that it was bound to be discovered.<sup>61</sup>

Among these names, let us highlight Marx’s focus on Augustin Thierry in his correspondence to Engels dated July 27, 1854 (from London to Manchester):

A book that has interested me greatly is Thierry’s *Histoire de la formation et du progrès du Tiers Etat*, 1853. It is strange how this gentleman, **le père of the ‘class struggle’** in French historiography, inveighs in his Preface against the ‘moderns’ who, while also perceiving the antagonism between bourgeoisie and proletariat, purport to discover traces of such opposition as far back as the history of the *tiers-état* prior to 1789. He is at great pains to show that the *tiers-état* comprises all social ranks and estates save the *noblesse* and *clergé* and that the bourgeoisie plays the role of representative of all these other elements.<sup>62</sup>

An examination of these quotations reveals that Political Marxists’ thesis aligns with the literature emphasizing that Marx’s concept of bourgeois revolution or class struggle is derived from liberal historians. However, it is important to note that this alignment is only partial, as none of the aforementioned authors (in the footnotes 57 and 58) explicitly states that Marx directly references bourgeois historians or that

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<sup>60</sup> Ibid, p. 61-62.

<sup>61</sup> Letter sent by Engels on January 25, 1894, to W. Borgius from London to Breslau (Wrocław in Polish), *MECW*, vol. 50, p. 266. In a letter to Ferdinand Domela Nieuwenhuis in The Hague, dated February 4, 1886, Engels listed his favorite reading list as follows: “The best works on the great French Revolution are indubitably those of Georges Avenel who died round about 1875. *Lundis révolutionnaires*, a collection of feuillets which came out in the *République Française*; also, *Anacharsis Cloots*, this last a survey, forming part of the biography, of the course of the Revolution up till Thermidor 1794. It’s melodramatically written and, if one is not to lose the thread, one has continually to refer to Mignet or Thiers for the exact dates. But Avenel has made a close study of the archives and also produces a vast amount of new and reliable material. He is indisputably the best source for the period from September 1792 to July 1794. Then there is a very good book by Bougeart on Jean Paul Marat, *L’Ami du peuple*; also another about Marat, said to be good, the name of whose author eludes me — it begins with Ch.[ F. Chèvremont] Some other good stuff also appeared in the final years of the Empire; the Robespierrites (Hamel, *St.-Just etc.*) not, on the whole, so good — mostly mere rhetoric and quotations from speeches. Mignet still remains the bourgeois historian of my choice.”, *MECW*, vol. 47, p. 398-399.

<sup>62</sup> *MECW*, vol. 39, p. 473 (our emphasis).

the historical materialist perspective he develops is fundamentally liberal.<sup>63</sup>

Upon examination of the aforementioned quotes, one observes a reflection of Marx's thoughts derived from his readings. Essentially, he elucidates the historicity of the concept of class struggle. Consequently, the assertion that Marx founded his ideas of historical materialism on bourgeois historians appears to be based on an excessive (or perhaps superfluous) interpretation. Notwithstanding this consideration, it is evident that Marx's relationship with bourgeois historians cannot be adequately explained by the mere circulation (copying and pasting) of ideas. Marx himself articulates this in his correspondence with Weydemeyer; just as the study of bourgeois economists is fundamental for the critique of political economy, the study of bourgeois historians is fundamental for the critique of bourgeois ideology and its conception of history.<sup>64</sup> At this juncture, it would be pertinent to recall the work of Sungur Savran, and through him, the concept of the "critique of political economy," which characterizes Marx's relationship with his predecessors in economics (particularly the classical school).<sup>65</sup> This consideration will provide insights into the "critique of bourgeois historiography," which will further elucidate Marx's relationship with predecessor historians.

Savran emphasizes that Hegel's concept of *aufhebung*, which encompasses both acts of supersession and conservation, is crucial for comprehending Marx's relationship with the classical school of political economy: There exists a superficial resemblance between Marx's analysis and the classical school; however, the decisive factor is the dialectical relationship between them, a relationship that involves both supersession and conservation.<sup>66</sup> In analyzing capitalist society, the classical school accepts the categories of society (value, price, profit, wages, rent, etc.) as given. These categories are not considered specific to a particular mode of production but are regarded as general, immutable, and universally valid natural forms.<sup>67</sup> Marx, conversely, posits that the relations of capitalist society are

63 As previously noted in footnote 57, Hobsbawm, who posits that Marx's conception of class struggle is predicated on bourgeois historians, does not repudiate either the concept of bourgeois revolution or its associated political perspective. Rather, he emphasizes that Marx and Engels did not systematically expound upon the concept of bourgeois revolution (Hobsbawm, *Echoes*, p. 6).

64 This point is also emphasized by Claude Mazauric, *L'histoire de la Révolution française et la pensée marxiste*, Presses universitaires de France, Paris, 2009, p. 38-39 and Bertel Nygaard, *History and the Formation of Marxism*, Palgrave, 2022, p. 208-209.

65 Sungur Savran, "Critique of Political Economy" in Sungur Savran and E. Ahmet Tonak, *In the Tracks of Marx's Capital, Debates in Marxian Political Economy and Lessons for 21st Century Capitalism*, Palgrave MacMillan, 2024, p. 57-79.

66 Sungur Savran, "Capital: An Introduction to the Three Volumes" in Sungur Savran and E. Ahmet Tonak, *In the Tracks of Marx's Capital, Debates in Marxian Political Economy and Lessons for 21st Century Capitalism*, Palgrave MacMillan, 2024, p. 39-44.

67 In this context, the following passage is useful: "Economists have a singular method of procedure. There are only two kinds of institutions for them, artificial and natural. The institutions of feudalism are artificial institutions, those of the bourgeoisie are natural institutions. In this they resemble the theologians, who likewise establish two kinds of religion. Every religion which is not theirs is an invention of men, while their own is an emanation from God. When the economists say that present-day relations—the relations of bourgeois production—are natural, they imply that these are the relations in which wealth is created and productive forces developed in conformity with the laws of nature. These relations therefore are themselves natural laws independent of the influence of time. They are eternal laws which must always govern society." Karl Marx, "The Pov-

historically determined and transitory. Since the classical school perceives relations in capitalist society as natural and fails to grasp their historicity, it could not provide an adequate explanation of these relations nor accurately resolve the determination of quantitative magnitudes. Only through historicizing the specific forms of social production (commodities, value, capital, etc.) can the interrelation between the categories prevailing in society and the laws governing the quantitative magnitudes determined within them be elucidated.<sup>68</sup>

Therefore, understanding the relations specific to the capitalist mode of production is a priority. Social forms, which are presuppositions for the classical school, become the problem itself for Marx. In Engels' words, "where others had seen a solution, [Marx] saw nothing but a problem".<sup>69</sup>

On the other hand, classical economists depict relations in a capitalist society as inverted and relations between people appear as properties of objects (see commodity fetishism). However, this inversion does not originate from classical economists, but rather from the capitalist reality itself. Marx's critique of political economy is therefore a critique of capitalist reality as well as a critique of bourgeois ideology.<sup>70</sup>

In this context, Political Marxists' assertion regarding Marx's acceptance of the liberal narrative of historical development bears a notable similarity to the perspective of Paul Samuelson, the Nobel Prize-winning liberal economist of the Cold War era, who failed to comprehend the dialectical relationship between Marx and classical political economy, consequently categorizing Marx as a classical economist:

Adam Smith, David Ricardo, Thomas Robert Malthus, and John Stuart Mill shared in common essentially one dynamic model of equilibrium, growth, and distribution. When the limitation of land and natural resources is added to the model of Karl Marx, he also ends up with this same canonical classical model.<sup>71</sup>

From this perspective, we can reread Marx's statement on the distinction in his own approach to include historians as well:

The view outlined here diverges sharply from the one current among bourgeois economists [and historians] imprisoned within capitalist ways of thought. Such thinkers do indeed realize how production takes place within capitalist relations. But they do not understand how these relations are themselves produced, together with the material preconditions of their dissolution.<sup>72</sup>

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erty of Philosophy. Answer to the *Philosophy of Poverty* by M. Proudhon", *MECW*, vol. 6, p. 174.

68 Savran, "Critique of Political Economy", p. 63-70.

69 Quoted by Savran, "Critique of Political Economy", p. 68 from Friedrich Engels, "Préface", *Le Capital*, vol. 2, tome 1, Editions Sociales, 1974, p. 21.

70 Ibid, p. 77.

71 Paul A. Samuelson, "The Canonical Classical Model of Political Economy", *Journal of Economic Literature*, vol. 16, no 4, 1978, p. 1415.

72 Quoted by Savran, "Critique of Political Economy", p. 68-69 from Karl Marx, "Appendix: Results of the Immediate Process of Production", in *Capital, A Critique of Political Economy*, vol. 1: *The Process of Production of Capital*, transl. by Ben Fowkes, London: Penguin Books, 1976,

To examine Marx's critique of bourgeois historiography, it is necessary to first consider the work of Augustin Thierry.

### **Augustin Thierry: "the father of the class struggle"**

From his letter to Engels dated July 27, 1854 (mentioned and quoted above), we understand that among the bourgeois historians, Augustin Thierry, whom Marx referred to as "the father of the class struggle," particularly interested him.<sup>73</sup> Donald R. Kelley, a significant figure in historiography, describes Thierry as follows: "Former secretary, collaborator, and 'adopted son' of Saint-Simon and disillusioned political journalist, Thierry turned away from the public arena more deliberately than his colleagues did and embraced history as both surrogate politics and higher vocation."<sup>74</sup> Marx's characterization of Thierry as "the father of the class struggle" initially suggests Thierry's contribution to historiography by emphasizing class struggle. However, Kelley contextualizes this characterization within a broader perspective, specifically in relation to Thierry's critique of the old historiography in France, and identifies him (in Thierry's own assessment) as the founder of the "new historical school" that emerged in France in the 1820s. Indeed, Thierry presents himself as the herald of a second, albeit historiographical, French Revolution, as he criticizes the great tradition of national historiography, which traces its origins to the 16th century, giving rise to the study of institutional history<sup>75</sup>:

Reform of the study of history, reform of the way history is written, war on the writers without learning who failed to see, and on the writers without imagination who failed to depict . . . ; war on the most acclaimed writers of the philosophical school, because of their calculated dryness and their disdainful ignorance of our national origins.<sup>76</sup>

Thierry's examination of the national dimensions of the new history within a social and institutional framework commenced in 1836, during the political climate of the July Monarchy (1830-1848), a bourgeois monarchy, when François Guizot commissioned him to compile sources on the history of the Third Estate. Thierry had previously blessed "bourgeois liberty" in the context of England<sup>77</sup>; now he was to investigate the formation and development of the Third Estate in the French context. His documentary study, *Essai sur l'histoire de la formation et le progrès du Tiers Etat*, focused on the ascension of the communes<sup>78</sup>, the royal court (*Etats généraux*), and the Parisian Parliament, through which the bourgeoisie, whose "historical

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p. 1065.

<sup>73</sup> *MECW*, vol. 39, p. 473.

<sup>74</sup> Donald R. Kelley, *Historians and the Law in Postrevolutionary France*, New Jersey: Princeton University Press, 1984, p. 21.

<sup>75</sup> *Ibid*, p. 20-21.

<sup>76</sup> Quoted by Kelley, *Historians...*, p. 21 from Augustin Thierry, *Dix ans d'études historiques*, Paris: J. Tessier 1835, p. XV.

<sup>77</sup> Augustin Thierry, *Histoire de la conquête de l'Angleterre par les normands, de ses causes et de ses suites jusqu'à nos jours : en Angleterre, en Ecosse, en Irlande et sur le continent*, Paris: Firmin Didot, 1825.

<sup>78</sup> Here, the commune refers to the bourgeoisie's self-governed city, freed from the feudal yoke.

destiny” was purportedly to be the bearers of liberties, was able to represent itself. In this process, the commoners (*la Roture*) emerged with a demand for equality against the nobility, asserting “we are just like you,” and by the 12<sup>th</sup> century had established themselves with the flourishing of urban liberties, progressing through “social revolutions,” eventually encompassing the entire nation in 1789.<sup>79</sup>

As Kelley emphasized, the influence of the German Historical School of Law was prominent in both historical scholarship and professional jurisprudence in the 1830s. In France, the “new history” approach developed under this influence, emphasizing legal and institutional history.<sup>80</sup> This influence is evident in Thierry’s study of the Third Estate (along with Jules Michelet’s *Origines du droit français* (1837)). Within the framework of the new history’s principle that “history is a novel and the people are its author” (according to Alfred de Vigny’s famous concept) law is considered an expression of a culture, a reflection of a spirit, created by the common people, and as such had to be established not by pure reason but by historical investigation and interpretation.<sup>81</sup> We think that Marx was able to penetrate and discuss Thierry’s work more easily due to the influence of the German School of Historical Law, which was also prominent in his legal education at university and in his early writings.<sup>82</sup> However, this appears to have occurred gradually. Marx’s references to Thierry’s *Lettres sur l’histoire de France* (1827) in his notes (particularly in the Kreuznach notebooks) and the excerpted passages are from its German translation *Geschichte von Frankreikh* (trans. Ernst Alexander Schmidt, 1835-1848). With reference to his letter to Engels, it appears that Marx only read Thierry’s work (*Essai sur l’histoire de la formation et le progrès du Tiers Etat*, published in 1853) in its entirety in 1854.<sup>83</sup>

### What if Thierry read Marx?

As Jean-Numa Ducange emphasizes, Marx appears to have devoted greater attention to long-term class struggles within the framework of Thierry’s research. If the urban revolution was a precursor to the significant movement of 1789, what were the events of 1789-1794 or 1848 precursors to? The focus here shifts from the moment of revolution to the evolution of social and political conflicts over centuries and their manifestation in class struggles.<sup>84</sup> In his correspondence with Engels dated July 27, 1854, Marx asserts that despite Thierry’s success in elucidating the formation of classes and the transformations leading to class domination, he fails to

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<sup>79</sup> Kelley, *Historians* ..., p. 21-22

<sup>80</sup> Ibid, p. 93.

<sup>81</sup> Donald R. Kelley, “Ancient Verses on New Ideas: Legal Tradition and the French Historical School”, *History and Theory*, vol. 26, no 3, 1987, p. 319-338.

<sup>82</sup> Alp Yücel Kaya, “Genç Marx ve ‘Odun Hırsızlığı Kanunu Tartışmaları’ ” [“Young Marx and ‘Debates on the Law on Thefts of Wood’ ”], Sevinç Orhan, Serhat Koloğlugil and Altuğ Yalçıntaş (eds.), *İktisatta Bir Hayalet: Karl Marx*, İstanbul, İletişim Yayınları, 2012.

<sup>83</sup> Jean-Numa Ducange, “Marx, le marxisme et le ‘père de la lutte des classes’, Augustin Thierry”, *Actuel Marx*, no 58, 2015, p. 16.

<sup>84</sup> Ibid, p. 19.

discern the dynamics of inter-class struggle, which he could have observed had he examined them personally:

Had Mr Thierry read our stuff, he would know that the decisive opposition between bourgeoisie and *peuple* does not, of course, crystallise until the former ceases, as *tiers-état*, to oppose the *clergé* and the *noblesse*. But as for the “*racines dans l’histoire ... d’un antagonisme né d’hier*” his book provides the best proof that the origin of the “*racines*” coincided with the origin of the *tiers-état*. By the same token, this otherwise intelligent critic would have to conclude from the “*Senatus populusque Romanus*” that in Rome there was never any opposition save that between the *senatus* and the *populus*. I was interested to discover from the documents he quotes that the term “*catalla, capitalia*”, capital, came into being with the rise of the communes. He has, by the by, unwittingly demonstrated that the victory of the French bourgeoisie was delayed by nothing so much as the fact that it did not decide until 1789 to make COMMON CAUSE with the peasants. Although he does not generalise, he depicts very nicely, 1. how from the beginning, or at least since the rise of the towns, the French bourgeoisie has gained undue influence by constituting itself a parliament, bureaucracy, etc., and not, as in England, by commerce and *industrie* alone. This undoubtedly holds true even of present-day France. 2. ***From his account it may be readily shown how the class rises as the various forms in which its centre of gravity has lain at different times are ruined and with them the different sections whose influence derives from these forms. In my view, this sequence of metamorphoses leading up to the domination of the class has never before been thus presented—at least so far as the material is concerned.*** In regard to the *maîtrises, jurandes*, etc., in short, the forms, in which the industrial bourgeoisie develops, he has, alas, restricted himself almost wholly to general, and generally known, phrases, despite the fact that here too he alone is familiar with the material. What he successfully elaborates and underlines is the conspiratorial and revolutionary nature of the municipal movement in the twelfth century.<sup>85</sup>

In Marx’s correspondence to Weydemeyer, dated March 5, 1852, wherein Marx asserts that the concept of class struggle was developed by liberal historians, which accounts for its frequent citation, particularly regarding the influence of liberal historians on Marx, he also articulates his own contribution to historical materialism (although this aspect is often omitted in the citations). The critique of bourgeois historiography is evident in this passage: Marx both supersedes and conserves the concept of class struggle that he derived from bourgeois historians, emphasizing the historicity of classes in relation to production, asserting that the class struggle will culminate in the dictatorship of the proletariat, and positing that the dictatorship of the proletariat will ultimately engender a classless society.

My own contribution was 1. to show that the *existence of classes* is merely bound up with *certain historical phases in the development of production*; 2. that the class struggle necessarily leads to the *dictatorship of the proletariat*; 3. that this dictatorship itself constitutes no more than a transition to the *abolition of all classes* and to a *classless society*. Ignorant louts such as Heinzen, who deny not only the struggle but the very existence of classes, only demonstrate that, for all their

<sup>85</sup> MECW, vol. 39, p. 474 (our emphasis).

bloodthirsty, mock-humanist yelping, they regard the social conditions in which the bourgeoisie is dominant as the final product, the *non plus ultra* of history, and that they themselves are simply the servants of the bourgeoisie, a servitude which is the more revolting, the less capable are the louts of grasping the very greatness and transient necessity of the bourgeois regime itself.<sup>86</sup>

The circular addressed to militants in Germany prepared by Marx and Engels on behalf of the Central Committee of the Communist League in March 1850 serves as a notable exemplar of critique regarding bourgeois historiography. Marx and Engels effectively elucidate the concept of “permanent revolution,” which both supersedes and conserves the bourgeois historians’ notion of class struggle and bourgeois revolution<sup>87</sup>:

While the democratic petty bourgeois [with whom the proletariat has allied itself] wish to bring the revolution to a conclusion as quickly as possible, and with the achievement, at most, of the above demands, ***it is our interest and our task to make the revolution permanent***, until all more or less possessing classes have been forced out of their position of dominance, the proletariat has conquered state power, and the association of proletarians, not only in one country but in all the dominant countries of the world, has advanced so far that competition among the proletarians in these countries has ceased and that at least the decisive productive forces are concentrated in the hands of the proletarians. For us the issue cannot be the alteration of private property but only its annihilation, not the smoothing over of class antagonisms but the abolition of classes, not the improvement of the existing society but the foundation of a new one.<sup>88</sup>

As soon as the new governments have consolidated their positions to some extent, their struggle against the workers will begin. Here in order to be able to offer energetic opposition to the democratic petty bourgeois, it is above all necessary for the workers to be independently organised and centralised in clubs ... The speedy organisation of at least a provincial association of the workers’ clubs is one of the most important points for strengthening and developing the workers’ party.<sup>89</sup>

If the German workers are not able to attain power and achieve their own class interests without completely going through a lengthy revolutionary development, they at least know for a certainty this time that the first act of this approaching revolutionary drama will coincide with the direct victory of their own class in France and will be very much accelerated by it.

But they themselves must do the utmost for their final victory by making it clear to themselves what their class interests are, by taking up their position as an independent party as soon as possible and by not allowing themselves to be misled for a single moment by the hypocritical phrases of the democratic petty bourgeois into refraining from the independent organisation of the party of the proletariat. Their

<sup>86</sup> *MECW*, vol. 39, p. 62, 65

<sup>87</sup> Quoted by Michael Löwy, “Politique”, Michael Löwy, Gérard Dumenil and Emmanuel Renault, *Lire Marx*, Paris: Presses universitaires de France 2009, p. 42 from Karl Marx and Friedrich Engels, “Circulaire de mars 1850 à la Ligue des communistes” *Œuvres politiques*, vol. 1, Paris: Gallimard, 1994, p. 547. Also see Michael Löwy, *The Politics of Combined and Uneven Development, The Theory of Permanent Revolution*, London: Verso, 1981, p. 14 and following pages.

<sup>88</sup> Karl Marx and Friedrich Engels, “Address of the Central Authority to the League”, *MECW*, vol. 10, p. 280-281 (our emphasis).

<sup>89</sup> *Ibid*, p. 284.

battle cry must be: *The Revolution in Permanence*.<sup>90</sup>

[The workers] know that the revolutionary movement of the bourgeoisie against the feudal estates and the absolute monarchy can only accelerate their own revolutionary movement. They know that their own struggle against the bourgeoisie can only dawn with the day when the bourgeoisie is victorious... They can and must accept the *bourgeois revolutions* a precondition for the *workers' revolution*. However, they cannot for a moment regard it as their *ultimate goal*.<sup>91</sup>

## The concept of the bourgeois revolution from Thierry to Plekhanov

We have seen that Marx developed a critique of bourgeois historians as well as a critique of political economy. Nevertheless, it remains imperative to ascertain the origin of the approach that confines the class struggle to a binary opposition, distorts the concept of the bourgeois revolution. In this regard, an article by Jean-Numa Ducange, who has gained prominence for his work on Marxism in recent years<sup>92</sup>, provides valuable insight.<sup>93</sup> According to Ducange, while the phrase “the father of the class struggle” has become a stereotype in 20<sup>th</sup>-century literature, the second part of Marx’s 1854 letter to Engels on class formations and transformations and the dynamics of the class struggle (which we have emphasized above) - which is incompatible with the binary approach that reduces the class struggle to the opposition of two easily identifiable camps - has generally been overlooked.<sup>94</sup> Ducange notes that in foreign-language Soviet manuals<sup>95</sup> on Marx’s conception of history, the first half of the famous letter is presented, while the second part on the transformation of classes is omitted, resulting in the loss of the concept of “transformation of classes.” He emphasizes that the same omission is also found in an article by Albert Soboul, who links Marx’s thought to Thierry.<sup>96</sup> According to Ducange, after Marx’s death, a certain relationship was established between his perspective of historical materialism and Augustin Thierry’s works, and a body of literature developed based on this construction. At this point, Ducange finds Emmanuel Renault’s observation reasonable: “as much as the questions of

90 Ibid, p. 286-287 (our emphasis).

91 Karl Marx, “Moralising Criticism and Critical Morality. A Contribution to German Cultural History. Contra Karl Heinzen”, *MECW*, vol. 6, p. 332-333.

92 Jean-Numa Ducange, *The French Revolution and Social Democracy : the Transmission of History and its Political Uses in Germany and Austria, 1889-1934*, transl. by David Broder, Leiden: Brill, 2018; Jean-Numa Ducange and Antony Burlaud (eds.), *Marx, A French Passion : The Reception of Marx and Marxisms in France’s Political-Intellectual Life*, Leiden: Brill, 2018.

93 Jean-Numa Ducange, “Marx, le marxisme et le ‘père de la lutte des classes’”, Augustin Thierry”, *Actuel Marx*, no 58, 2015, p. 12-27.

94 Ibid, p. 21.

95 Eugénia Stépanova et al., *Karl Marx, sa vie, son œuvre*, Moscou: Éditions du progrès, 1973, p. 278; *Histoire de la France de la Révolution de 1789 à la fin de la Première guerre mondiale*, Moskova: Édition du progrès, 1973-1978, vol. 2, p. 201-202.

96 Albert Soboul, “Jaurès, Mathiez et l’histoire de la Révolution française”, *Annales Historiques de la Révolution française*, no 237, 1979, s. 447. We think that Ducange is a bit unfair to Soboul, since Soboul is one of the leading figures, along with Daniel Guérin, in discussing the French Revolution through class struggles by including those of *sans-culottes* and *bras-nus*.

alienation and materialism, the question of dialectics has been subjected to the process of Marxism inventing its own tradition.”<sup>97</sup> According to Ducange, the same applies to the “class struggle” and its putative “father,” and it is necessary to expose this subsequent invention.<sup>98</sup>

Let us continue to follow Ducange: Considering Marx’s complete works (the MEGA compilation), there are minimal explicit references to Thierry by Marx. However, it is pertinent to examine when the notion of a significant connection between them and its reiteration became prominent. Ducange posits that it is either the quotations from Marx and Engels’ correspondence in major works published posthumously, or subsequent Marxist theorists who established Thierry as the “father of the class struggle.” An examination of the excerpts from the letters reveals that Marx’s 1852 letter to Weydemeyer was first published in the German social-democratic theoretical journal *Neue Zeit* in 1906, while his letter to Engels initially appeared in the second volume of the Marx-Engels correspondence published in 1913.<sup>99</sup> Consequently, the communist tradition that emerged post-1913, primarily after the October Revolution of 1917, established Thierry as Marx’s reference. It is noteworthy that Thierry’s book *Essai sur l’histoire de la formation et du progrès du Tiers États* was not reprinted in France after Marx’s death, and historical scholarship during the Third Republic (1870-1940) effectively marginalized Thierry’s work.<sup>100</sup>

Notwithstanding the aforementioned, Ducange highlights that Georges Plekhanov, a Marxist theorist, consistently referenced Thierry even prior to the discovery of Marx’s letters in 1906 and 1913. Following 1880, no other Second International leader allocated as much attention to liberal historians, particularly Thierry, as Plekhanov, who was instrumental in the development of Marxism (and who, despite his Menshevik affiliation, was praised by Lenin for his contribution to the development of Marxism in Russia). While Marx and Engels made no explicit reference to Thierry in their published works, only in their personal correspondence during their lifetimes, Plekhanov conducted a comprehensive analysis of Thierry’s works, which he regarded as fundamental to the Marxist concept of class struggle. Indeed, his article “*Augustin Thierry et la conception matérialiste de l’histoire*” [“Augustin Thierry and the Materialist View of History”], which directly addresses Thierry’s work, was published in the French Marxist theoretical journal *Le Devenir social*<sup>101</sup>:

Karl Marx’s historical materialism does not indiscriminately condemn the histori-

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97 Quoted by Ducange, “Marx...”, p. 22 from Emmanuel Renault, *Marx et la philosophie*, Paris: Puf, 2014, p. 40. In fact, Sungur Savran’s emphasis on the concept of the critique of political economy in Marx also fits this context (Sungur Savran, “Critique of Political Economy”, p. 57-79.).

98 Ducange, “Marx...”, p. 22.

99 Quoted by Ducange, “Marx...”, p. 23 from Franz Mehring, “Neue Beiträge zur Biographie von Karl Marx und Friedrich Engels”, *Die neue Zeit : Wochenschrift der deutschen Sozialdemokratie*, vol. 2, notebook 31, 1906-1907, p. 160-168; Bebel August and Bernstein Eduard, *Der Briefwechsel zwischen Friedrich Engels und Karl Marx, 1844 bis 1883*, Stuttgart: Dietz, 1913.

100 Ducange, “Marx...”, p. 14.

101 Georges Plekhanov, “Augustin Thierry et la conception matérialiste de l’histoire”, *Le Devenir social*, no 8, 1895, p. 693-709.

cal ideas of previous schools; it merely removes a fatal contradiction from these ideas, which prevented them from breaking out of a vicious circle.

Another result no less worthy of our attention is that, while it is not true to say that Marx was the first to speak of the class struggle, there can be no doubt that it was he who first revealed the true cause of the historical movement of mankind and, by the same token, the “nature” of the various classes which, one after the other, appear on the world stage. Let us hope that the proletariat will make good use of this valuable discovery by the great socialist thinker.<sup>102</sup>

Apart from this article, he mentioned Thierry in many of his works, even in the preface to the Communist Manifesto, which he translated into Russian and published in 1900:

This new point of view, the point of view of *social or class interest*, combined with the attachment to those “fathers” who had for centuries borne the brunt of the struggle against the privileged classes, was bound to lead to an awareness of the considerable historical importance of the struggle of interests between the various social classes - in short, of the *class struggle*.<sup>103</sup>

Therefore, it seems that by 1900, before Marx’s famous quotations were known, Thierry had become a reference for Marxists through Plekhanov.

So, what is Plekhanov telling us? Starting from Thierry, Plekhanov highlighted the conflict between two classes at a particular historical moment within a binary model, showing that different class conflicts are sequenced one after the other in the historical process. In line with his pedagogical and activist aims to popularize Marxism, Plekhanov takes the sharpest side of Thierry and presents the class struggle in a rather simple conceptualization: if the bourgeoisie stood against the nobility, it would be the turn of the proletariat against the bourgeoisie.<sup>104</sup> But what is interesting is that Plekhanov, despite having analyzed Thierry’s complete works, arrived at a more limited conclusion than Marx, who conducted a less comprehensive analysis. Whereas Marx derives from *L’essai* a method for the sequential historical transformation of a class, Plekhanov is far from this, focusing on the immediate political efficacy of the class struggle. For Thierry, the urban revolutions anticipated 1789, then for Plekhanov, for socialists, popular movements and class struggles can anticipate the proletarian revolution. The bourgeois democratic revolution overthrows feudal society and builds a bourgeois society in which the working class finds a place; the socialist revolution makes the transition from a class (bourgeois) society to a classless society. Accordingly, industrialized and democratically developed countries should follow the path of the socialist revolution, while underdeveloped countries with a weak working class should follow the path of the bourgeois democratic revolution to build the conditions for the socialist revolution. The first “grand narrative” of the Second International, constructed especially by Plekhanov,

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<sup>102</sup> Ibid, p. 709.

<sup>103</sup> Ducange, “Marx...”, p. 24 from Georges Plekhanov, “Préface au Manifeste du parti communiste”, *Œuvres philosophiques*, vol. 2, Moskova, Éditions du progrès, 1961-1983, p. 491.

<sup>104</sup> Neil Davidson underlines in the same way that Plekhanov’s materialism is mechanistic, see Davidson, *How Revolutionary...*, p. 184, 194-195.

inherited this model.<sup>105</sup> The concrete result of this perspective for Plekhanov and the Mensheviks was to link the revolution against Tsarist rule in Russia to the alliance of the working class with the bourgeoisie, following the bourgeoisie's alliance with the dissident nobility in France to overthrow the kingdom:

When the ideologists of the French bourgeoisie in the XVIII century “went” among the aristocracy, recruiting fighters for a new social order, did they betray the *point of view of their own class*? Not at all. No such betrayal occurred, only a perfectly correct political calculation (or, if you will, instinct), which led to an even more consistent affirmation of exactly the same point of view. And will there be any betrayal if ideologists of the proletariat go among the “upper” classes with the goal of finding means and resources that might serve the interests of Social Democracy? It would appear that in this case, too, there will be no betrayal; here again, the “reaching out” will be a matter of political calculation.<sup>106</sup>

The more we separate the wheat from the chaff, the more we see that Political Marxists present the reading (or misreading) of history that leads us to Menshevism's alliance with the bourgeoisie as an absolute one, and that they nullify Bolshevism and the permanent revolution. This perspective was previously already apparent in their conflation of the revolutionary perspectives of Plekhanov, Kautsky, Lenin, and Trotsky, despite all their divergences. Interestingly, they adopt an approach that critiques Plekhanov yet arrives at a position analogous to Plekhanov. Their stance can be considered even more regressive than Plekhanov's, as the latter at least regards Marx as a revolutionary figure, whereas they characterize young Marx as a liberal.

## Conclusion: Other sources of Marx's theory of revolution

The revolutionary movement that began in 1789 with the *Cercle Social*<sup>107</sup>, whose main representatives in the middle of its career were *Leclerc* and *Roux*, and which finally succumbed temporarily with the *Babeuf* conspiracy, had germinated the communist idea that *Babeuf's* friend *Buonarroti* reintroduced to France after the revolution of 1830. This idea, developed with consequence, is the *idea of the new state of the world*.<sup>108</sup>

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105 Ducange, “Marx...”, p. 24-25.

106 Quoted by Davidson, *How Revolutionary...*, p. 195 from Georges Plekhanov, “‘Orthodox’ Pedantry”, Richard B. Day and Daniel Gaido (eds.), *Witnesses to Permanent Revolution: The Documentary Record*, Leiden: E. J. Brill, 2009 [1903], p. 148-149.

107 “*Cercle social*—an organisation established by democratic intellectuals in Paris in the first years of the French Revolution. Its chief spokesman, Claude Fauchet, demanded an equalitarian division of the land, restrictions on large fortunes and employment for all able-bodied citizens. The criticism to which Fauchet and his supporters subjected the formal equality proclaimed in the documents of the French Revolution prepared the ground for bolder action in defence of the destitute by Jacques Roux, Théophile Leclerc and other members of the radical-plebeian ‘*Enragés*’.” (*MECW*, vol. 4, p. 690).

108 Quoted by Walter Markov, “Jacques Roux et Karl Marx (Sur l'entrée des ‘*Enragés*’ dans la Sainte Famille)”, *Recherches internationales à la lumière du marxisme*, no 62 (*Voie de la révolution bourgeoise*), 1970, p. 87 from Karl Marx and Friedrich Engels, *La Sainte famille*, Paris: Editions sociales, 1969 (1845), p. 145.

It is clear from this passage that in 1845, Marx knew what the *Cercle social* was and who Jacques Roux was. But how did he know these things? According to Walter Markov, known for his work on *Enragés*<sup>109</sup>, P.-J. Bouchez and P.-C. Roux's *Histoire parlementaire de la Révolution française* (40 volumes, 1834-1838) is a source for Marx; his main source however is (utopian socialist) Etienne Cabet's *l'Histoire populaire de la Révolution française 1789-1830* (4 volumes, 1839-1840). When Marx wanted to write the history of *La Convention*, he must have already seen Cabet's work, although there is no hint of this in the manuscripts.

As a result, we would like to propose the hypothesis that Marx felt provoked by Cabet's unserious overestimation of the "Hébertistes" and felt the need to put things back on their feet here too, that is, on real class terrain. However, going beyond his earlier observations on the character of the Revolution, he recognized the essence of a movement to the left of the Jacobins and discovered the position of the Enragés; in so doing, he encountered a decisive element. The "Doctor of the Revolution", as Henri Heine put it, had thus legitimized Jacques Roux as the practical hook for an idea whose very existence Marx had set himself as the goal of elaborating and transforming into a theory that becomes a material force as soon as it takes hold of the masses.<sup>110</sup>

Therefore, Marx was well aware of social forces and struggles other than the bourgeoisie during the French Revolution. He defined revolution as a bourgeois revolution in the final analysis. This reflects a political perspective intertwined with the present. Starting from the social dynamics of 1789, he showed the necessity of a social revolution in 1844 by setting "human emancipation" against political emancipation, and in 1846 with the perspective of "communist revolution." This can be seen in the article he wrote in 1847, in the context of his polemic with Karl Heinzen<sup>111</sup>:

If therefore the proletariat overthrows the political rule of the bourgeoisie, its victory will only be temporary, only an element in the service of the *bourgeois revolution* itself, as in the year 1794, as long as in the course of history, in its "movement", the material conditions have not yet been created which make necessary the abolition of the bourgeois mode of production and therefore also the definitive overthrow of the political rule of the bourgeoisie. The terror in France could thus by its mighty hammer-blows only serve to spirit away, as it were, the ruins of feudalism from French soil. The timidly considerate bourgeoisie would not have accomplished this task in decades. The bloody action of the people thus only prepared the way for it. In the same way, the overthrow of the absolute mon-

109 The *Enragés* were a revolutionary group in France in 1793, led by Jacques Roux, a former priest, and Varlet, a postal official. This group advocated for social and economic measures that favored the lower classes. Their appellation reflects the horror they elicited among the bourgeoisie.

110 Markov, "Jacques Roux..." p. 96. The validity of Markov's interpretation is evidenced by Marx's plan for a "Library of the Best Foreign Socialist Writers" drafted on March 7-17, 1845. The plan, depicted on paper, features a central box containing Cercle social, Hébert, Jacques Roux and Leclerc; the left column lists Morelly, Mably, Babeuf, Buonarroti, Hobach, Fourier, Considérant, Cabet; the lower middle column includes Owen, Lalande, Producteur, Globe; and the right column comprises Bentham, Godwin, Helvétius, Saint Simon, Dzemay and Gay. (Karl Marx, "Plan of the 'Library of the Best Foreign Socialist Writers'", *MECW*, vol. 4, p. 667).

111 Löwy, "Marx et la Révolution française..." p. 238.

archy would be merely temporary if the economic conditions for the rule of the bourgeois class had not yet become ripe. Men build a new world for themselves, not from the “treasures of this earth”, as grobian superstition imagines, but from the historical achievement of their declining world.<sup>112</sup>

As Michael Löwy underlines, Marx’s observation is striking that if the proletariat overthrows the political rule of the bourgeoisie before the material conditions for its power are in place, as in 1794, its victory will only be temporary and will ultimately serve the bourgeois revolution itself. In an article published in 1847 (as previously cited), Marx highlighted Babeuf’s struggle as follows:

The first manifestation of a truly active communist party is contained within the bourgeois revolution, at the moment when the constitutional monarchy is eliminated. The most consistent *republicans*, in England the *Levellers*, in France *Babeuf*, *Buonarroti*, etc., were the first to proclaim these “social questions”. *The Babeuf Conspiracy*, by Babeuf’s friend and party-comrade Buonarroti shows how these republicans derived from the “movement” of history the realization that the disposal of the social question of *rule by princes* and *republic* did not mean that even a single “social question” has been solved in the interests of the proletariat.<sup>113</sup>

In this context, it is useful to recall Friedrich Engels’ observation of 1843: “We must have either a regular slavery—that is, an undisguised despotism, or real liberty, and real equality—that is, Communism. Both these consequences were brought out in the French Revolution; Napoleon established the first, and Babeuf the second.”<sup>114</sup>

Upon thorough examination, we concur with the conclusions drawn by Jean Bruhat and Michael Löwy, who provide a comprehensive analysis of the place of the French Revolution in Marx’s thought. The study of the French Revolution contributed substantially to the formulation of a materialist and dialectical conception of history. Class struggles, the contradiction between the development of productive forces and relations of production, and the complexity of class conflicts extending beyond the primary class oppositions to encompass secondary class movements are among the critical issues that the French Revolution brought to Marx’s attention. While historical materialism has numerous sources, Marx’s engagement with these questions opened a novel perspective within this theoretical framework. Marx’s innovation lay in combining the communist critique of the French Revolution’s limitations (from Babeuf and Buonarroti to Moses Hess) with the class analysis propounded by bourgeois historians of the Restoration period (Mignet, Thiers, Thierry, et al.) and placing the whole formed by his materialist historical method by superseding and conserving it through a dialectical approach within the context of world history. Consequently, Marx occupies a distinctive position among historians of the French Revolution.

Political Marxists’ view of young Marx as liberal when they see references to

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112 Karl Marx, “Moralising Criticism and Critical Morality. A Contribution to German Cultural History. Contra Karl Heinzen”, *MECW*, vol. 6, p. 319-320.

113 Ibid, p. 321-322.

114 Quoted by Bruhat, “La Révolution française...”, p. 161 from Friedrich Engels, “Progress of Social Reform on the Continent”, *MECW*, vol. 3, p. 393.

bourgeois economists and historians (or subjects they raised), and their search for bourgeois in the Revolution, like all revisionists, reminds us of Marx's critique of political economy:

Vulgar economics actually does nothing more than interpret, systematize and turn into apologetics the notions of agents trapped within bourgeois relations of production. So it should not surprise us that precisely in the estranged form of appearance of economic relations that involves these *prima facie* absurd and complete contradictions - and all science would be superfluous if the form of appearance of things directly coincided with their essence - that precisely here vulgar economics feels completely at home, these relationships appearing all the more self-evident to it, the more their inner connections remain hidden, even though they are comprehensible to the popular mind.<sup>115</sup>

In doing so, they directly conflate the appearance of things with their essence, thereby throwing out historical materialism and the concept of bourgeois revolution. They refuse to historicize the great upheavals, thus directly coinciding with the bourgeois economists and historians, not in appearance but in essence.<sup>116</sup>

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115 Karl Marx, *Capital, A Critique of Political Economy*, vol. 3: *The Process of Capitalist Production as a Whole*, transl. by David Fernbach, London: Penguin Books, 1981, p. 956.

116 From this perspective it is not surprising that 2024 Nobel laureates in the economic sciences, Daron Acemoğlu, James Robinson and Simon Johnson refer in their every book to Robert Brenner's 1976 article ("Agrarian Class Structure and Economic Development in Preindustrial Europe.") as an important precursor of their approach: Daron Acemoğlu and James A. Robinson, *Economic Origins of Dictatorship and Democracy*, Cambridge University Press, 2005, p. 350; Daron Acemoğlu and James A. Robinson, *Why Nations Fail, The Origins of Power, Prosperity and Poverty*, Profile Books, 2012, p. 469, 471, 472; Daron Acemoğlu and James A. Robinson, *The Narrow Corridor: States, Societies, and the Fate of Liberty*, New York : Penguin Press, 2019, p. 937 (of epub version); Daron Acemoğlu and Simon Johnson, *Power and Progress : Our Thousand-Year Struggle over Technology and Prosperity*, New York: Public Affairs, 2023, p. 774, 777, 800, 804 (of epub version).

## Book launch

# In the Tracks of Marx's *Capital*

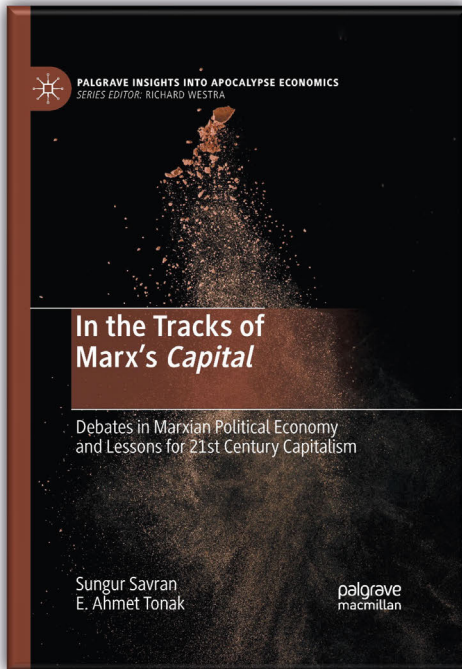
### Authors:

Sungur Savran

E. Ahmet Tonak

### Publisher:

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*"A masterly work... A passionate and intelligent application of Marxist categories."*

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This book provides an accessible introduction to Marx's seminal work *Capital* and explores the core ideas of Marxian political economy relevant for modern day economies. The first part gives an overview of *Capital* based on the authors' original thinking in the methodology of *Capital*. The second part discusses the application of these ideas to some understudied questions of measuring profit on alienation, the rate of exploitation, the reconstruction of input-output tables, and the role of the welfare state and social wage. The third part sets forth new research in Marxian analysis in the 21st century, facing the challenges brought about by digital labor and the deep crisis of the global economy. The last part discusses the Marxism/Neo-Ricardianism controversy.

# At Kant's Tercentenary: Relevance of Kant's Categorical Imperative for Revolutionary Politics

Ana Bazac<sup>1</sup>

This paper was completed after I wrote the four parts seen below and intended both to discuss Kant in an engaged way, and not neutral – as is the fashion between the professional philosophers, and to popularize him in a blog, in order to show to non-philosophers that he is not incomprehensible and far from their everyday concerns but, on the contrary, helps them. Now, at the advice of a colleague from the board of *Revolutionary Marxism*, I grouped the parts in a single article. They signal the actuality of Kant when such sensitive topics as the wars in Ukraine and Palestine are approached, as well as Kant's contradictory attitude towards the French Revolution. And the analysis and the conclusion highlight that, despite the limits of Kant's liberalism, just his revolutionary ethical theory of categorical imperative was continued – and by surpassing it – by Marx.

## (1) Introduction

We are in a Kant philosophical year (Immanuel Kant, 1724-1804). In fact,

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philosophy is interested and reflects about what *common people* think and are interested in; and, irrespective of the historical frames and limits of the technical philosophical effort, philosophy as such is valuable and remains in the memory and patrimony of humanity only at the extent of real solutions for the *real problem of the human history*: the situation, reason-to-be and dignified life of *every common human being on Earth*.

From all the exploits of the world thinkers we retain only that which is *significant/ useful to us, now, in an always present-day reality*. The professional philosophers and analysts of different kinds are, on the one hand, interested to better understand how and why the forerunners thought in a way or another; but on the other hand, they seem to shut themselves between the walls of an esoteric language and an illusion of elitism. Actually, the technical language can be understood without troubles if it is explained. And this explanation is not a reduction, a vulgar simplification, but just the absolutely necessary activity – and somehow, the reason-to-be – of bringing the professional research closer to the general public, to whom the research is actually intended, serves it.

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Kant is a giant in the patrimony of humanity: through his *epistemological* breakthrough of *cognition as a multi-stage idea formation process*, and through his *ethical* revolution of the *categorical imperative*. The categorical imperative is the moral law of – keep attention – *all the rational beings: to never treat the others only as means but always also as ends* – as ends of both *every individual* and the *human species*, because *every human being* is a representative of humanity and humanity exists only if this moral law is fulfilled.

The professional philosophers – as during the Kant celebration this year – focus on the countless technical aspects of the epistemological theory, and sometimes on some of its applications: but almost never on the main application, the *categorical imperative* theory. Famous philosophers seem to have given to this condensed formula of the moral way of humans, bad marks: that it would be formal, abstract and emotionless, related to a non-earthly command of *duty*. However, just the categorical imperative means clear *content* of the duty and thus, not abstract calls for compassion, charity or reciprocity, but a concrete way to measure and control one's own limits and criteria.

Philosophers have always believed that they refer to every man, but the abstract reduction to the image of their historical and social condition never corresponded to every human being. Kant was the first who, through his *demonstrated* ethical application of the epistemological theory of what does reason mean, clearly highlighted that the human moral is not fulfilled by individuals isolated in their frame and struggling to “survive” on the expense of “others”/ “faraway”, thus “exterior” to the frame from which one speaks about “moral”. Kant was the first who advanced the quality of the human individual as a *species being*, representative of not only the human species but also of the category of “all rational beings” (in the universe).

# I

## Kant's actuality: the present war in Ukraine

### (2) The duty of a species being

After 1785 – when Kant produced *Groundwork of the Metaphysics of Morals*, demonstrating the theory of categorical imperative – he no longer subordinated his philosophical analysis to mainstream ideological ideas legitimating race differences and inherent submission. Obviously, his reasoning was limited by the highest level of political emancipation in Europe in the 18<sup>th</sup> century, that of the bourgeois citizen, but nevertheless just the strictness of the transcendental perspective led him to suggestions transcending his epoch.

One of such suggestions is in *Metaphysics of Morals*<sup>2</sup>, when the problem of *duties* was deployed in relation with the concept of *freedom*. Both this concept and the one of *duty* are *transcendental*, they are *determined by the laws of reason* and have the function of *regulative principles generating practical moral laws*, both unconditional/imperatives and technical ones, conditionally commanding. Duty evaluates the hypothetical (contingent) purposes, maxims and imperatives from the standpoint of the categorical imperative which shows the ultimate reason-to-be of goodness: *one cannot infringe the reason to treat the others as ends in themselves, as unique and unrepeatable individuals representing, each of them, the species of rational beings on the Earth, if one wants to keep one's own representativeness of the human species and of its reason*.

(Do not be afraid of apparently sophisticated words. “Transcendental” simply means a level of reasoning *from concepts*, and not from experience: so, a strict logic derived from already existing ideas, and not from the everyday experience that generates ideas related to this experience, without interest for general ideas and their substantiation. The concept is abstraction from abstractions. As it is well-known, Kant unified the levels of cognition, showing their interdependence: “Without sensibility no object would be given to us, and without understanding no object would be thought by us. Thoughts without content are empty, intuitions without concepts are blind”<sup>3</sup>. But the importance of concepts – giving the transcendental level of inferences, now this term became familiar, isn't it? – is obvious not only in the real process of thinking, where we simply cannot do it without concepts, but also, and for us now a priority, in the fulfilment of the coherence/truth/development of our thinking giving *universals*, *beyond* a direct image of reality given to us through empirical abstractions. This “beyond” means here to focus on the *causes* of things, and to not consider that we understand events and facts according to their labels and images given to us by those who control the world.

Thus, neither the concept of “metaphysics” is scary either. It means a demonstration rather from concepts and aiming to find the basic *principles*

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2 Immanuel Kant, *The Metaphysics of Morals* (1797), Introduction, translation and notes by Mary Gregor, Cambridge University Press, 1991.

3 Immanuel Kant, *Critique of Pure Reason* (1781/1787), Translated and edited by Paul Guyer and Allen W. Wood, Cambridge University Press, 1998, B75/A51, pp. 193-194.

explaining and generating reality. So, a level of knowledge that is beyond a direct image of reality given to us through empirical abstractions. Here, “beyond” means ideas which seem to be more profound than those which are related to reality).

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So, the first duty of the human individual is his/her duty *qua* species being. Why is the duty of the human individual *qua* individual not the first human duty? Because the duty of the individual *qua* individual (to live, to persist, to survive) is specific to every living being, to every animal, or the human has reason, thus it's the *duty arisen from human reason* that is specific to this species, and not the instinctual will to live.

It's obvious that the first duty of man to himself is “*to preserve himself in his animal nature*”. But, although first, this duty is *not* principal<sup>4</sup>, because *if this “natural end” is not fulfilled in a moral way*, the result is not the lasting of a “person” – a living being having reason and, essentially, a moral reason that allows him to being responsible<sup>5</sup> – but of an animal. And the basis of the moral way of the first duty of man to himself – *implying even the right to be authorised to take the life of those who assail me* – is to not infringe both the right of others (who have the same first duty of man) and the law.

### (3) Duty and right in the state of necessity

Here Kant answers to the nowadays ardent problem of the “right of pre-emptive actions”. There is a huge difference, Kant says, between the right to kill an assailant – this right being both *moral*, and only from a moral standpoint being recommended “moderation” in exercising the right to kill the aggressor, and *lawful* – and on the other hand, a “supposed right” (Kant is the one who put the quotation marks) to kill someone who did nothing to harm. This supposed right is absurd: because in order to be a right it must correspond to a *state of necessity* (Kant gave the example of someone in a shipwreck who shoves another off a plank that cannot support both) and this state is already *instinctive*, outside reasonableness. And thus, *to a state of necessity only the primary duty to preserve one's life corresponds, and not a right*.

For this reason, we can characterise from a *moral* standpoint such *state of necessity*, as well as the guy himself can after his fact: “from outside” we cannot say that the guy who saved his life by drowning the other is guilty (according to the primary duty), because we understand that his *instinct* of self-preservation was stronger than the restraint required by the moral law; but, and even though, after the fact the guy himself feels deeply shocked and considers his deed as profoundly immoral, because now as always he has “in his soul” the moral law to help the other human being as helping their common humanity; and thus, because he knows that they both belong to this species, for him this *internal moral law* is the instance, and not the *instinct* of self-preservation: although he knows as well that this instinct governed

<sup>4</sup> Immanuel Kant, *The Metaphysics of Morals*, p. 218 (AA VI: 421).

<sup>5</sup> *Ibidem*, p. 50 (AA VI: 223).

him in that unfortunate moment. (The example of Kant, the guy drowning the other in order to save himself, reminds us the Medusa's shipwreck (1816))<sup>6</sup>.

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With his example, Kant raised an extremely important issue of the *existential state of necessity* or, in present researches, *extreme situation*, synonymous to *extreme violence* related to war and getting out of the war<sup>7</sup>; but synonymous also to perplexity and defeatism in peacetime.<sup>8</sup> What is common to these different faces of the state of necessity is the challenge of the moral law and the generalisation of an abductive movement from this law.

However, Kant posed the problem of *juridical sanctionability* of this fact, of a presumed correspondence between an instinctual state of necessity and the external juridical sanctions as right/wrong, namely the position of society represented by the legislator in front of instinctual states of necessity. Well, society itself – *as if* it would be a single human – takes over the moral self-judgement of the guy: (from a societal standpoint) the fact “must not be judged” as blameless, he was *not* innocent, and *if* there would exist objective sanctions, a law, for punishing him, he would be. But there is no law for this fact, thus the guy is “*inculpabile*”, he cannot be deferred to justice. And thus, he neither can be punished; or, conversely, an *instinctual* violent action of self-preservation is not a wrongdoing against a right, and thus it is unpunishable (“*impunibile*”). And Kant underlines that the juridical practice has both a subjective basis (in front of reason) and an objective basis (in front of “a court”), and we must not confound them: in front of the juridical reason, the guy is not punishable, but in front of a court he could be brought and judged, *if* there was a law for his act. Because, ultimately, the court represents *vox populi*, the moral conscience.

(From this distinction, we can deduce the necessity to legislate according to the complex multitude of facts, thus to establish rights and juridical duties in order to *prevent infringements against the reason-to-be of justice*).

#### (4) Kant's actuality: the present war in Ukraine

But – and just the model of the “supposed right” to kill someone who did nothing to harm helps us – what about the *pre-emptive actions against a supposed future destructive attack* against my life? Here, *the judgement of the previous facts of*

6 See Nebiha Guiga, Aurélien Portelli, « Les récits du radeau de la Méduse : L'histoire d'une situation extrême au prisme des violences et des sorties de guerre », *Napoleonica. La Revue*, 2023/2 (N° 46), p. 139-172.

7 See Véronique Nahoum-Grappe, « Anthropologie de la violence extrême : le crime de profanation », *Revue internationale des sciences sociales*, 2002/4, p. 601609 ; Michèle Battesti, Jacques Fremeaux (dir.), *Sortir de la guerre*, Paris, Presses de l'Université Paris-Sorbonne, 2014.

8 Ana Bazac, “*Conatus* and the worth of life in a time of crisis”, in *Philosophy and Crisis: Responding to Challenges to Ways of Life in the Contemporary World*, 2013 Conference Proceedings, G. Maggini, H. Karabatzaki, V. Solomou-Papanikolaou and J.Vila-Chã (Eds.), vol. II, Washington D.C., Council for Research in Values and Philosophy, book series IV. “Cultural Heritage and Contemporary Change”, vol. 11, November 2018, pp. 137-152.

*the presumptive aggressor is sine qua non.* And in this judgement, the *reasons* of the presumptive aggressor must be revealed, obviously by distinguishing between imagined pretexts and legitimising stories and, on the other hand, the responsible technical analysis of these reasons.

If so, we can relate the American destructive war against Vietnam – whose anti-popular and pro-American “South Vietnam” was constructed by the USA who forbade, stopped and punished the popular will of popular democracy – that did never intend to harm in whatever way the US, and, on the other hand, the supposed “unprovoked aggression” of Russia against Ukraine, that would be rightfully opposed by NATO.

The Vietnam war was initiated by US in order to stop the spreading of communist ideas in Asia (as before, in the Korean war), and thus in order to develop and preserve the American economic and political domination in Asia, and obviously in order to prevent the influence of communist ideas in the world. Is the American war against Vietnam an illustration of the duty of self-preservation? And is the American goal to preserve its power in Asia assimilable to the metaphysical instinct of self-preservation? Actually, all the modern wars were for the preservation and increase of the political and economic influence of different ruling strata against each other (and thus, and ultimately, over the ruled of all these countries, in order to preserve the domination-submission pattern of societal organisation).

But is “plunder and conquest”, “oppression of domination”<sup>10</sup>, similar to self-preservation? Of course not, our moral conscience warns us: because “the moral principle in the human being is never extinguished”<sup>11</sup>.

The tacit *justification of all the war originators* was just the equivalence between the self-preservation of the individual life and the preservation of political and economic domination. Therefore, morally, this was also the justification to wage war against those who did not harm and could and want not harm the war originators. Consequently, to pre-emptively attack and killing those who do not wage war against the pre-emptive war originators was and is “morally justified”.

This “moral law” governed all the wars waged between the Western powers and the “rest”. The *juridical law of war* appeared *only between Western powers* which, on the one hand, had similar means of self-preservation and attack, and on the other hand, similarly fought for each one’s power. And which, ultimately, had the “rest” of the world to plunder in order to compensate the eventual transferring of a slice of power from one Western power to another and the buying of the popular “consensus” from their own countries. This Western law of war – imposing rules for restraint, for correspondence between the means and the results of tactical operations,

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9 Immanuel Kant, *Toward Perpetual Peace* (1795), in *Toward Perpetual Peace and Other Writings on Politics, Peace, and History*, Edited and with an Introduction by Pauline Kleingeld, Translated by David L. Colclasure with essays by Jeremy Waldron, Michael W. Doyle, Allen W. Wood, New Haven and London, Yale University Press, 2006, p. 95 (AA 8: 371)).

10 Immanuel Kant, *Critique of Judgment* (1790), Translated, with an Introduction, by Werner S. Pluhar, With a Foreword by Mary J. Gregor, Indianapolis/Cambridge, Hackett Publishing Company, 1987, p. 318 (5: 430).

11 Immanuel Kant, *Toward Perpetual Peace*, *ibidem*, p. 103 (AA 8: 380)).

for the treatment of civil population and the interdiction to use it as a means – was, however contradictory and absurd morally, the criterion developed after the WWII as a progressive step in the humanisation of global relationships.

After the Vietnam war, there were more than enough proofs that USA infringed the law of war – including the Geneva Convention, by the use of Agent Orange to indiscriminately kill civilians directly and in time (as in its use of nuclear bombs in Hiroshima and Nagasaki, 6 and 9 August, 1945) – but as it is known, these proofs were erased from the public conscience and the public agendas and were never followed by the legal punishment of perpetrators.

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Concerning Russia's war against Ukraine, things are different. Ukraine – which was a periphery of the Russian empire, with mixed populations of mainly Ukrainians and Russians – was juridically established as a state *after* the October Revolution and in a soviet and socialist federation, where the juridical, political, economic and cultural rights and equality of *all citizens* of the Union of Soviet Socialist Republics were established and imposed by law. There were no borders between republics, all citizens freely circulated in the Union, and Ukraine has developed its culture and economy just within the USSR.

Ukraine is now the tragic battlefield for the Ukrainian and Russian populations, but after 1991 the Ukrainian ruling class fully subordinated Ukraine to the imperialist powers *in order to preserve its own ruling power, against the popular will to preserve the popular democracy*. The function of this subordinated Ukraine was to be the ground of the decisive blow of imperialism to Russia, the coronation of the 1989-1991 destruction of Eastern socialism. This goal of imperialism and this function of a sold Ukraine were prepared by encircling Russia with new NATO member states in Europe, as huge military bases bearing the newest and destructive weapons, and by transforming Ukraine into a declared enemy of Russia, the Ukrainian state poisoning the mind of its population with the permissiveness and recommendation of extreme violence against the Russian speaking population. And because the decisive blow to Russia cannot be done without the NATO membership of Ukraine, if not *de jure* at least *de facto*, by transforming it into a trigger of the decisive attack against Russia, this state *prevented the imperialist decisive attack* by initiating in February 2022 its “special operation” intended to change Ukraine's war function against it.

Therefore, only *formally* did Russia a pre-emptive aggression against Ukraine. *Really*, the aggressors are NATO and Ukraine. But this first move of Russia was and is used by NATO and Ukraine in order to deploy the intended decisive attack against Russia. Ukraine, with the full help of NATO, bombed the Zaporizhzhia nuclear plant, in a Russian territory, and destroyed dams and civil buildings in Russian territories, *expressly* targeting civilians. While Russia never targeted civilians. And the war, assassinating so many Ukrainian soldiers, continues with the weapons of NATO. However, the NATO and Ukraine's justification is “the Russian

aggression”<sup>12</sup>.

Since, using Kant’s theory, both parts have the first duty to themselves (to preserve their lives), can we conclude that the war is, indeed, caused by Russia’s aggression? No, because Kant emphasised: there is no necessity “that would make what is wrong conform with law” (“*gesetzmäßig*”, legal, that is, juridically legitimate)<sup>13</sup>. Thus, not only from a moral but also from a juridical standpoint, too, the war is not caused by Russia’s movement in February 2022, but by NATO’s facts *at least from the 2014 Maidan*.

## II

### Kant’s actuality: Kant dismisses the “Right” to colonise

#### (5) Neither the utopian liberalism is coherent

Yes, Kant’s *distinctive* philosophy – that of his already mentioned breakthroughs in epistemology and ethics, actually, after *Groundwork of the Metaphysics of Morals*, 1785 – *does not lead to racism*<sup>14</sup>: on the contrary, and on the basis of his demonstration of the human cognition, just the categorical imperative emphasises what is *universalizable* in the human moral, *opposing any particularism*.

But Kant was the son of his epoch. He could but taking over the dominant ideology of his time, *liberalism*, and thus he tried to accommodate the *universalizable* moral with the *particularism* of class domination over inferior human beings, both in the internal and in the international space. The dominant liberalism deployed only as *juridical and political freedom*. Because just these types of freedom assured, internally, the constitution of a consistent bourgeois class together with some consensus of the labour force<sup>15</sup>: and thus, the constitution of states with free citizens. These states were supposed to be the institutionalisation of the original

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12 Deputy Pentagon Press Secretary Sabrina Singh Holds a Press Conference, Aug. 8, 2024, <https://www.defense.gov/News/Transcripts/Transcript/Article/3867296/deputy-pentagon-press-secretary-sabrina-singh-holds-a-press-conference/>: “Ukraine’s incursion into Kursk” “is consistent with our policy” “a region that are within the US policy of where they can operate, you know, our weapons, our systems, our capabilities”.

13 Immanuel Kant, *The Metaphysics of Morals*, pp. 60-62 (AA VI: 235-236), here p. 62 (AA VI: 236).

14 See Ana Bazac, “The Enlightenment Epistemology and its Warning against the Instrumentalisation of Science”, *Noema*, 2020, pp. 29-75, and “Understanding the Virtues of Enlightenment Epistemology”, *Dialogue & Universalism*, 2/2021, pp. 211-230; also, “Our Most Important Everyday Use of Kant: The Categorical Imperative”, *Analele Universității din Craiova. Seria Filosofie*, 2/2024, forthcoming.

But see Kant’s critique of racism, both empirically and theoretically as *infringement of the principles of right*, Pauline Kleingeld, “Kant’s Second Thoughts on Colonialism”, in Katrin Flikschuh and Lea Ypi (Eds.), *Kant and Colonialism: Historical and Critical Perspectives*, Oxford, Oxford University Press, 2014, pp. 43-67.

15 Robbie Shillian, *Race and the Undeserving Poor*, Newcastle upon Tyne, Agenda Publishing, 2018.

social contract between free citizens transferring their right to decide the policies of the state to the sovereign. These states were the Western European ones and were free states: free to do what? Had these free states limits in their exploits to acquire more power for a well-off “survival”?

However, although Kant took over the *never questioned social contract theory* and his time's liberalism, he could but mark it with the idea of the *moral universalizable*. Thus, Kant gave to liberalism a *utopian* guise. And this once more revealed the *incoherency* and *inconsistency of bourgeois liberalism as such*. There cannot be class domination and exploitation of the “free” labour force and, at the same time, an ethics of the universal moral equality of all human beings.

An aspect of this inconsistency was the international manifestation of liberalism. And although the model of international liberalism was only that of free Western European countries, nevertheless the “rest” of the world had to appear.

## **(6) There is no Right of Nations / there is only the right of free states**

Well, even based on the model of free states, things were direr on international level than on the internal one. If there is a Right regulating the relations between the citizens of a state, there is not, and *not* only during Kant's time, a *Right of nations*: because – said Kant, representing the political liberalism not rejected even by the present dominant ideology – the states have no the equality that the citizens of a state have, obviously an equality of the political and juridical citizen status. Accordingly, the states cannot have a universal law of international Right that would regulate the contracts between them as juridical (Kant said, “moral”) persons.

For this reason, the international *status quo* is in a “nonrightful condition”<sup>16</sup>. “This nonrightful condition is a *condition* of war (of the right of the stronger), even if it is not a condition of actual war and actual attacks being constantly made (hostilities)”<sup>17</sup>.

Anyway, Kant continued, the nonrightful condition is that of “lawless savages”<sup>18</sup> for whom only the right to declare war is natural. However, it is not even a universal law of the present states: because only the “free states”<sup>19</sup> can have this right. Anyway, both the right to declare war and to prepare or prevent war take part from the Right of nations that is deeply contradictory: one cannot “even form a concept or to think of law in this lawless state without contradicting oneself”<sup>20</sup>. This is why Kant listed aspects of war and post-war which are right and aspects which are not, in the confrontation of unjust enemies.

But “what is an *unjust enemy* in terms of the concepts of the Right of Nations in which – as is the case in a state of nature generally – each state is judge in its own

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16 Immanuel Kant, *The Metaphysics of Morals* (1797), Introduction, translation and notes by Mary Gregor, Cambridge University Press, 1991, p. 151, § 54 (AA VI: 344).

17 *Ibidem*.

18 *Ibidem*, p. 151, § 54 (AA VI: 344).

19 *Ibidem*, p. 151, § 55 (AA VI: 344).

20 *Ibidem*, p. 153, § 57 (AA VI: 347).

case?”<sup>21</sup> It is, Kant answered, “an enemy whose publicly expressed will (whether by word or deed) reveals a maxim by which, if it were made a universal rule, any condition of peace among nations would be impossible and, instead, a state of nature would be perpetuated”<sup>22</sup>.

But isn't this the definition of states which dominate peoples and territories and consider that this domination is their right, imposing an international law (order based on rules) according to this “right”? Is an international law based on domination-submission, anything other than a “state of nature” – deplored by the first (liberal/bourgeois) social contract theorists – where cruelty and non-human irrationality provide the rules? And can we, in the 21<sup>st</sup> century, think that this international law is fair and benign for the human species?

In a state of nature, Kant insisted, the *rights* acquired by states – through war or otherwise – are only *provisional*. As a result, the Right of Nations itself can never be but *provisional*. However, what gives to the present nonrightful condition of states some stability and order is the *principle of clear contracts between parts*. To promote a state's own rights means to advance them within contracts: and just this type of *promotion of rights through contracts* gives states the quality to being free.

In Kant, “the rights of *humankind*” that is represented in the moral reason manifests as *juridical* rights of the people and, internationally, the free peoples. These rights, as Right, are “sacred” and thus their formulation is a *categorical imperative of politics*: one cannot respect them with “a half measure” and “devise a hybrid, pragmatically conditioned right (between right and utility)”<sup>23</sup>.

## (7) There is no right to colonise

In this frame, Kant examines the right to make a settlement on the land of other state<sup>24</sup>. We should not forget that it is about free states, thus this right requires a specific contract. But Kant also discusses this problem related to *peoples*, and not to states (“Hottentots, Tungusi and most of the American Indian Nations”) and here he claims also a contract, one “that does not take advantage of the ignorance of those habitants”. This claim is based on the principle of *justice*, and *no pretext of beneficial results of the infringement of justice* (as, he insists, that of “civilising of these backward peoples”, pretext already used for the excusing of the bloody introduction of Christianity in Germany; or as the cleaning of the states that colonise from “corrupt men”) *is legitimated*.

Thus, colonialism is not moral, it cannot be legitimated as a juridical right, because no subjugated people could have been and could be an equal part in a contract

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21 *Ibidem*, p. 155, § 60 (AA VI: 349).

22 *Ibidem*.

23 Immanuel Kant, *Toward Perpetual Peace: A Philosophical Sketch* (1795), in Immanuel Kant, *Toward Perpetual Peace and Other Writings on Politics, Peace, and History*, Edited and with an Introduction by Pauline Kleingeld, Translated by David L. Colclasure with essays by Jeremy Waldron, Michael W. Doyle, Allen W. Wood, New Haven and London, Yale University Press, 2006, p. 104 (AA 8: 380).

24 Immanuel Kant, *The Metaphysics of Morals*, p. 159, § 62 (AA VI: 353).

selling its own territory. Can we really think – and could Kant really think – that the “Hottentots, Tungusi and most of the American Indian Nations” have sold their territory in a contract based on equal information and gains?

### **(8) How would Kant characterise the present international life**

The present international Order based on Rules is not a Right of Nations, but a “nonrightful” imposition of domination of the states which had and have the most implacable means of violence, the “carrot” at the end of the “stick” still being a form of violence.

This frame generates and is supported by an Orwellian “newspeak”: as that describing as “humanitarian behaviour” the authorisation by the state of Israel of camions transporting international “humanitarian aid” to Gaza. But the hypocrisy and absurdity of this description belongs not only to the state of Israel, but also to all states benefitting from and supporting the present international Order based on Rules, eventually sending to Gaza “humanitarian aid” but at the same time weapons to destroy it. Whose rules are the ones that sustain this Order?

Kant did not elaborate further the problem of the concrete situation of the “American Indian Nations” on a territory that no longer belonged to them and where a settler colonialism established its rules with an incredible will to exterminate them and to erase the memory of their civilisation. He considered that the demonstration through transcendental principles – which, in fact, are the result of the human reason and, thus, understandable and created by every human being – would change the existing cruel path toward a *fait accompli*. He did not arrive to see, in the second half of the 20<sup>th</sup> century, the “coexistence” of the settler white domination and the non-white peoples, native or forcefully brought in order to work for the masters. Would have Kant said that these non-white people have no the right to impose a modern constitution proclaiming the juridical and political freedom of all residents of the state?

The destiny of colonised peoples intertwined with the type of social system that controlled and continued to control these peoples. The Tungusi and all the other local native peoples radically changed their status in the USSR: they became citizens, and *equal citizens* with all the other peoples of the Union, having the right to develop their language and culture and benefitting, together with all the other peoples and citizens, of the economic and social rights which allowed a dignified life of all.

The “Hottentots” and the American Indian Nations remained in colonies or, as pariahs, in the settler colonial countries. Nowadays, the Africans gained their political independence, and in the Republic of South Africa they succeeded to abolish the apartheid.

### **(9) The present war against Palestinians**

But capitalism is a system that cannot exist without disposing of always more and more material and human resources, and thus, without an aggressive politics

imposing its power on the world. The Middle East – Arab land – is an example. Israel is a *settler colonialism* established on the Palestinian land, in order to promote in this region, the power and interests of the Western, mostly American, power and interests.

The present war of Israel against Palestinians is a pro-apartheid war of Israel, and against the modern liberal principles claimed by it and its Western supporters. It has an international deep resonance<sup>25</sup> and, indeed, is a threshold toward a new world order – but paid by the tragic death of Palestinian and Lebanese children, women, elderly, and young warriors: the future and the real wealth of Palestine, Lebanon and, actually, of humanity –. Israel backed by the Western capitalism think that it/they will achieve what the American and English capitalism did in the 19<sup>th</sup> century: a *fait accompli* of full domination of a foreign land, where the remnants of the – now called – “First Peoples” will bow their head forever. But the communist ideas of all citizens’ equality in the control of the means of production and existence, and the abolishment of apartheid in South Africa are precedents no longer allowing a shameful repetition of that historical moment.

The incredibly savage war against Palestinians, a clear war of extermination, is a blow even to its perpetrators. It definitely discloses the *structural limits* of capitalist liberalism: on international scale, but even in the privileged countries. Every criticism is strangled, accused of “antisemitism”, in the name of a false universalism of equality of all particular ethnical groups. But the present criticism of the imperialist war against Palestinians is based just on the moral universalism of all the human beings and the rejection of the “survival” of a group at the expense of other ones. The present criticism is not one of an ethnical or whatever group, but a criticism of politics based on imperialist and racist ideology, a criticism of capitalism. Contrary to this criticism is just the more or less covered *racism* of imperialism<sup>26</sup>.

And once more the *bla bla ideology of capitalism that is, structurally, imperialist* reveals to be absurdly contradictory: it advances the precept of the universal human nature – prescribing, accordingly, “stress reduction exercises” which in fact fit only for the real or idealised “middle classes” struggling with the “uncertainty” surrounding them but closed in the Western type “gated community” – and at the same time, assumes subordination of the inferior, racism<sup>27</sup>, and inevitably, the merciless extermination of the opposing *realist, and not utopian, universalism of human beings advancing the universalizable*.

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25 See Tenth emergency special session, Agenda item 5, Illegal Israeli actions in Occupied East Jerusalem and the rest of the Occupied Palestinian Territory, 13 September 2024, United Nations, General Assembly, <https://documents.un.org/doc/undoc/ltid/n24/266/48/pdf/n2426648.pdf>.

But also, Alain Marshal, *Pourquoi risquer la prison pour la Palestine ?*, 21 octobre 2024, <https://alainmarshal.org/2024/10/21/pourquoi-risquer-la-prison-pour-la-palestine/>.

26 As revealed in Angela Saini, *Superior: The Return of Race Science*, Beacon Press, 2019.

27 Ana Bazac, “The Problem of the Coexistence of the Concept of Human Nature and Racism”, *Dialogue & Universalism*, 1/2021, pp. 139-156.

### III

## Kant's actuality: Kant's contradictory attitude towards the French Revolution

### (10) Justice and popular revolts

Kant related the injustice made to the colonised peoples to the injustice made by the European “Ancien Régime” against the French Revolution: but where “the revolutionaries” *can pretext* that “when constitutions are bad it is up to the people to reshape them by force”. That is to say, the European counter-revolutionary governments and principles made an injustice to the French Revolution: and at the same time, this revolution was “against nature”.

But he wrote this in 1797 (*The Metaphysics of Morals*), after the victory of the big bourgeoisie aided and followed by the petty one against the raising of the “sans culottes”; and the winners depicted the losers as unjust terrorists. Under this influence, by putting the important problem of justice during the revolutionary upheavals, Kant said: injustice made first cannot be the price for latter justice<sup>28</sup>.

At the level of abstract sense of justice, this means that the punishment of unjust deeds is not allowed, even though this punishment involves and brings justice. But, still at this level of abstract sense of justice, where then is justice, how can it be established? At the level of judgements about politics, this meant for Kant – and for all the liberal supporters of the systems based on domination-submission – that the revolution against the established order of domination-submission is not allowed, and that the critiques of this order provide only pretexts.

Therefore, even though Kant emphasised before that to implement justice means and is a step towards achieving the requirement (the categorical imperative) that morality itself contains, the pressure of the dominant spirit of counter-revolution was so huge that he considered that the political and juridical liberalism of free citizens would be enough to progress toward justice.

However, this abdication from the maximalist principle of morality was not related only to the French Revolution and took place not only as a result of the influence of the winners of the French Revolution. The problem is indeed related to the bigger one: *the legitimating of the popular revolts*.

But here Kant *did not take to the end* the “transcendental” principles of reason he created. Because, as he demonstrated:

- (if) moral is duty for the implementation of the categorical imperative;
- (if) it is obligation;
- (if) *justice* (even expressed in Right) is the empirically expressed *contents* of moral;
- (if) politics is the executive theory of Right (Therefore, Right legislates in politics, moral does not legislate, it is inner obligation);
- (if) politics is not based on the legislation of Right (simpler expressed, if it is refractory to justice),

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28 Immanuel Kant, *The Metaphysics of Morals*, p. 159, § 62 (AA VI: 353).

- then – also because “the implementation of (the) idea (of unity of a people in a commonwealth) in practice can rely on nothing but violence to establish the juridical condition, and it is hence the coercive force of violence upon which public right will subsequently be based”<sup>29</sup> – “a state can govern itself in a republican manner, even if it still possesses a despotic ruling power *according to its present constitution*, until the people gradually become able to be influenced by the mere idea of the authority of the law (as if it exerted physical force) and hence are found capable of their own legislation (which is originally based on right)”<sup>30</sup>. So, *the state resulted from the French Revolution is legitimate and viable according to the transcendental principles. But...*

Do not forget, a republican constitution is based on juridical freedom and juridical equality of citizens, and provides a unique legislation that has its origin in the social contract.

### **(11) What kind of revolution did Kant endorse?**

May the above quote rather fit for the modern states which did not implement all the “reforms” to remedy flaws in the constitution which is, however, quite good? It is fit for both these states *and* the revolutionary France. As it is known, Kant oscillated between the idea of gradual reforms – helping also the transformation of the civic culture of people into an enlightened one – and the idea that the revolutions are allowed when these reforms do not happen (when “concept of right is an empty thought”, and the rulers do not fulfil their duty toward s the people<sup>31</sup>). But he distinguished between revolution *as a political transition to a legal state*, like the “transfer” of sovereignty from the king to the National Assembly, and thus both becoming the representatives of the people, and, on the other hand, revolution *as unlawfully use of the sovereignty of the people*<sup>32</sup>.

But with all this swing, Kant could not annul the idea of *sovereignty of the people* as the ultimate origin of realisation of the pure juridical principles which are a transposition of the moral right. Accordingly, he *supported the right of the French Republic to defend itself from the counter-revolutionary European armies*: “Even if the impetuosity of a revolution provoked by a bad constitution were to bring about a more lawful one illegitimately it should no longer be deemed permissible to return the people to the previous constitution, even though under the old constitution any person who had violently or maliciously participated in that revolution would have rightly been subject to the punishment accorded rebels”. The illegitimate manner Kant refers to is the deployment of the French Revolution from the first moment of *transfer of sovereignty* to the National Assembly in June 1789 (and after which still a constitutional monarchy followed) to that of *declaration of republic* in 1792. Kant considered that the 1789 moment was a legal one<sup>33</sup>.

29 Immanuel Kant, *Toward Perpetual Peace*, *ibidem*, p. 95 (AA 8: 371).

30 *Ibidem*, I underlined.

31 *Ibidem*, p. 96 (AA 8: 372).

32 See Reidar Maliks, “Kant and the French Revolution”, *Las Torres de Lucca. Revista internacional de filosofía política*, 12(2), 2023, pp. 113-119.

33 Immanuel Kant, *The Metaphysics of Morals*, p. 133 (AA VI: 323).

## **(12) Nevertheless, the new revolutionary state had the right to defend itself**

Kant's argument for the right of the French Republic to defend itself was: "one cannot demand of a state that it abandon its constitution, even if the latter is despotic (which indeed makes it a stronger one with regard to foreign foes), as long as the danger exists that it could be swallowed up by other states. It must therefore be permissible to delay the carrying out of such a change of constitution until a more fitting opportunity arises"<sup>34</sup>).

And he insisted in the footnote: "These are laws of permissibility. They allow for leaving in place a condition of public right that is tainted with injustice until everything has either itself developed to the point at which it is ripe for a complete change or been brought closer to ripeness by peaceful means. For any kind of juridical constitution, even if it is only to a small degree in conformity with right, is better than no constitution at all. The latter fate, anarchy, is precisely what a hasty reform would lead to. Political wisdom will thus make it a duty to pursue reforms in accordance with the ideal of public right under existing circumstances, but will not use revolutions brought about by nature as excuses in order to engage in an even greater oppression, but rather take it to be an appeal of nature to bring about a lawful constitution based on principles of freedom, the only enduring kind of constitution, by means of thorough reforms"<sup>35</sup>.

An interesting demonstration was made about Kant's view that nevertheless, the revolution is not only allowed, but it is a duty when the sovereign does not accomplish the rights of citizens in a civil society: when either the subjects who revolt are not citizens – thus do not enjoy the civil society that is necessary as organisation that assures the political and juridical freedom and rights – or are citizens in a state where the sovereign does not fulfil his duty to assure Right<sup>36</sup>. However, does this view suggest that the Prussian serfs would have been allowed to revolt?

## **(13) Loving the idea of revolution of the people, but...**

Kant summarized his conception about the French Revolution in *The Conflict of Faculties* (1798), chapter 6, On an event in our time which proves this moral tendency of the human race<sup>37</sup>. Here he separated the reasoning about the Revolution as such from the evaluation of the mindsets of humans, related to Revolution.

Concerning the second aspect, Kant showed that the "sympathy in wish that borders on enthusiasm" is caused by the *moral* capacity of the human race. However, "enthusiasm is aimed solely at the *ideal* and, indeed, at the purely moral, to which the concept of right belongs". Consequently, "the outside, viewing public then sympathized with this feeling of exaltation without the least intention of participating".

34 Immanuel Kant, *Toward Perpetual Peace*, *ibidem*, p. 96 (AA 8: 372).

35 *Ibidem*, p. 97 (AA 8: 373-374).

36 See Chris W. Surprenant, "A Reconciliation of Kant's Views on Revolution", *Interpretation – A Journal of Political Philosophy*, Volume 32, Issue 2, 2005, pp. 151-169.

37 Immanuel Kant, *The Conflict of Faculties* (1790), in Immanuel Kant, *Toward Perpetual Peace and Other Writings on Politics, Peace and History*, pp. 155-157 (Ak 7: 85 and 86).

It is a very realistic picture of the average “prudence”, isn’t it?

Concerning the reasoning about Revolution, Kant emphasised two kinds of arguments, intertwined. First, it is the transcendental moral approach that, as a cause, generates a transcendental concept of *right*: “that a people must not be hindered by other powers in giving itself a civil constitution that it itself regards as good”. And the fulfilment of this right is a *duty*. But still a duty, says Kant, is that “only such a constitution of a people is *in accordance with right* and morally good in itself which, in its nature, is made such that wars of aggression are avoided as a matter of principle”. This prevention of war is assured by a “republican constitution, at least in its conception”. (Kant saw that monarchical constitutions cannot prevent wars).

Well, what to be done when other countries attack the country governed on the basis of a republican constitution? *This country must defend itself*, as showed above.

But, and now Kant passes to the arguments related to the practical experience, if the need of a republican constitution is a transcendental need, the citizens from a monarchical state have *no the right* to change the constitution into a republican one. Because the monarchy (Kant refers to England, “a country that lies more than a hundred miles from the site of the revolution”) has in its possession “extended territories in Europe” and in order to keep them (“maintain itself”) “amidst powerful neighbors”, “perhaps” this monarchical constitution is the best. And just because of this economic power of the state, “the grumblings of the subjects are not due to the government’s domestic policies” (the same was said by Tocqueville when discussing the causes of Revolution in a prosperous state). There are only some ones who protest against “its policy toward foreign nationals when it, for instance, hinders foreigners in forming a republic, and are in no way proof of a people’s dissatisfaction with its own constitution”.

Therefore, the dialectics of things shows a tangled situation. On the one hand, the subjects rise up – and must do this – for “the *principle*” that is “capable of the universality of a rule”, their *freedom*, based on their rationality, to demand “according to the *formal* principle of his will, (a) government for the people (in) which the people co-legislates”; (AB, with the sovereign to whom the people transferred its sovereignty, in the original contract). “It is something which no government, however beneficent it may be, may infringe on”.

However, too much radicalism is not good, so “this right is always only an *idea* whose implementation is restricted by the condition that its *means* are consistent with morality, which the people must never contravene, and it may not be realized by means of revolution, which is always unjust”.

Consequently, on the other hand, *the uprising of the people is never allowed because of its misery and neither because of lacks in its well-being*. On the contrary, if it obeys “like obedient sheep, led by a kind and understanding master, well fed and strongly protected, would have nothing to complain about concerning their welfare”. Consequently, “Autocratic *rule* and yet republican *governance*, that is, in the spirit of and analogous to republicanism, are what makes a people content with its constitution”. This was the theoretical recipe for both the “constitutional monarchies” and the *modernisation without political revolution* (as Gramsci called this, “passive revolution”) that was the process suited for all the modern states, ir-

respective of their form of governance.

#### **(14) Even though limited, Kant's liberalism was utopian; the present liberalism of "the left" is a cynical defeat**

Can't we see in this original liberal contradictory position the latter attitudes towards the October Revolution and socialism? Of those benevolent, "progressive" and even "socialists" who supported the theory of necessity to abolish capitalism, but not the practice to do this, and they opposed to this practice in a ruthless way? Do we not see that they never understood that the *ideal conditions for realising socialism can never be met*, and that the power of all common people of the world must be unleashed in order to build a society of dignity of all human beings? Do we not see that the beautiful creation of the human mind, the categorical imperative, vanishes if we do not consider the *consequences* of the capitalist relations? We obviously do not sneer at the above care related to revolutionary "means" – that is, proletarian *class violence of abolishment of privileges and main private property*, not personal revenge; or, destruction of the domination class characteristics of people, not their physical destruction – saying that "so, the capitalist means were okay and allowed, but the proletarian means are "unjust", isn't it?" But can't we see that the means the revolutionaries practise are just in accordance with the moral principles forbidding and annulling the use of man/ of those outside the dominant class only as a means?

Kant could not see all of these, obviously, but the witnesses of the WWI could, seeing that capitalism wants to resist at the cost of the destruction of civilisation, including of the humanist beliefs in the transformation of cruelty into moral behaviour.

## **IV**

### **Kant and Marx on the Road of Universalism**

#### **(15) Marx's attitude towards the Kantian moral metaphysics**

Obviously, here only the moral and social aspects of the two are mentioned, and only indicating main elements of continuity and discontinuity.

Marx constructed a *scientific demonstration* of the *possibility/viability* of a communist alternative to capitalism. And this was a theory, having different theoretical origins. In the ethical domain – although Marx did not have ethical papers – it is Kant<sup>38</sup>.

38 For the relations between Kant and Marx, see: Harry van der Linden, *Kantian Ethics and Socialism*, Indianapolis/Cambridge, Hackett Publishing Company, 1988, Butler University Books. 17; Howard Williams, "Karl Vorlaender's Kantian Synthesis of Marx and Kant", *Kant Yearbook*, Volume 13, Issue 1, 2021, pp. 129-152; discussing Hermann Cohen in the neo-Kantian Marburg School, Elisabeth Widmer, "'Left-Kantianism' and the 'Scientific Dispute' between Rudolf Stammler and Hermann Cohen", *Archiv für Geschichte der Philosophie*, October 18, 2023.

To a thinker focused on the *objective* and *subjective* conditions of a proletarian revolution, the reduction of concrete freedom and rights to the political and juridical ones, as Kant did, is a proof of theoretical inconsistency of the author. However, even though Marx criticised Kant's metaphysical approach of the law and politics, he saw both the *implicit critique of their real modern forms this metaphysics allows* and also, and especially, the *critical valences of the moral metaphysics*. Very early, Marx characterised the Enlightenment's, thus Kant's, penchant to metaphysics as a display of scepticism "in regard to the rationality of *what exists*"<sup>39</sup>, just opposed to the denial of rationality as such by the promoters of "think positive!" – if this allusion to the present is allowed – /by those who consider both that *what is real is rational* or that, *however is the real irrational, it still must be taken for granted and as a basis of the legal forms*. Thus, if these ones are "irrational" and "uncritical" and their point of view is assumed by the official modern state, *Kant is rational and critical*<sup>40</sup>. Just what was needed for a critical, thus fruitful analysis of the modern organisation of society. The uncritical "positive" obsequious approach – where "the right of arbitrary power"<sup>41</sup> is principle – emphasised the valences of the moral metaphysics, of the categorical imperative: it is the *ought* that must regulate the norms of power relations if we moved away from outdated rules, as everyone considers modernity.

Kant showed how is to understand the levels of knowledge and that the level of concepts allows catching the real phenomena not as individual and particular occurrences but as *universal and necessary* facts. In his turn, Marx – who was interested only about the methodological aspect of epistemology, the succession of concepts (*defined according to their contents*) in the development of theory – related the universal and necessary to the *historical process* and to the *social relations*. Kant's critical method concerned the *theoretical* and the *metaphysical*, the concepts with their meanings and function of *form* needed to be re-viewed; Marx's critical method concerned the *development of real social relations* and only on this basis he confronted the concepts. However mentally conceived, the universal and necessary ideas do not develop by themselves, but only in connection with the historical and social reality. For this reason, Marx's critical method concerned the *whole*, the complex interdependencies and feedbacks of ideas – and different types of ideas – and /with economy, politics, law, culture, consciousness. And the whole can be caught only if the *forms* are related to *contents*, given by experience.

Marx criticised Kant's moral "idealism" not from the standpoint of its practical conclusions: on the contrary, just this perspective of moral idealism showed to be and "must be rightly regarded as the German theory of the French revolution"<sup>42</sup>, precisely opposed to those who mocked it from the point of view of closing the real within institutions that hinder its development.

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39 Karl Marx, "The Philosophical Manifesto of the Historical School of Law" (1842), *Marx Engels Collected Works*, Volume 1, Lawrence & Wishart, (1975), 2010 Electric Book, pp. 203-210 (here, p. 205, I underlined). (Marx-Engels, *Gesamtausgabe*, I, pt. 1, 251-259).

40 *Ibidem* (2010), p. 204.

41 *Ibidem* (2010), p. 210.

42 *Ibidem*, p. 206.

Thus, for Marx the groundwork of the moral metaphysics was okay, even highly necessary; but not the “metaphysics of law” that rejected the social reality<sup>43</sup>. Exactly the legal norms – and thus, the political institutions and relations – must correspond to the social reality. If in moral, the common good happens when the humans are not treated only as means, but always also as ends, it cannot manifest *realiter* – not only when the political and legal norms remove from *what is* and impose domination, *structural asymmetry of freedom* – but, fundamentally, in economic relations which once more make them helpless and ineffective.

## (16) Kant's forms and Marx's contents

The metaphysical demonstration of Kant – i.e., the quest for principles from deduction from concepts, they themselves defined in the frame of meanings given *in abstracto* – is not a philosophical oddity we can well drop out. Its alternative is not the cynical “realism” that affirms the *status quo* as rational, thus “quite good.” On the contrary, just Kant's insistence on the *ought to be* fuels the *realism* of the creation of the common good. This Kantian spirit was continued by Marx, both showing the necessity to *re-examine the essential structures of the modern society*. Both made a “*transcendental critique*” of society – this adjective meaning here a highly theoretically proven analysis – and moreover, Marx made a *grassroots critique*.

Kant presented the formation of ideas *qua* ideas, as *forms*. Marx pointed out the formation of ideas as *contents* and their dependence on both the concrete contents given by experience and, in this frame, on the way of thinking *these contents*: this was the reason of not only his explanation of *ideology* but also his focus on the *methodology of thinking the contents*.

Kant was not the first philosopher who made obvious how determinative is to have a *clear conscience* of the ideas we “naturally” arrive at. But he was the first who explained that this clear conscience of ideas is the awareness of ideas as *forms*, i.e., as *our* mental synthesis that, although starting from the information given by senses, slightly removes from it because the concepts ensue from processing the empirical notions and the ideas from the processing of concepts. Marx continued the focus on the clear conscience of ideas, because without this focus the *cardinal role of ideas in the conscience and deeds of people* is not understood.

And he proved that the clear conscience of ideas always involves their *contents*: which are not at all neutral copies of the state of facts but reflect just the experience of humans, their historical experience and, regarding the inherent social experience obviously in the frame of social relations, their *position* within the concrete social relations. And of course, the ideas circulate, are emitted, taught, learned, assumed, thus, regarding the ideas about their social experience, people take over, consciously or not, even ideas which do not correspond to their social position. People *interpret* the facts – letting here aside that even the information describing the facts reflect

<sup>43</sup> See the analysis of the very young Marx's analysis of jurisprudence, his starting point, Donald R. Kelley, “The Metaphysics of Law: An Essay on the Very Young Marx”, *The American Historical Review*, Vol. 83, No. 2 (Apr., 1978), pp. 350-367.

the power relations and are emitted according to the social position/interest of the rulers – only in principle according to their own social position, in reality their ideas related to society are subordinated to the dominant social position. Therefore, a clear conscience of ideas involves the awareness of the “social positions” of ideas/ of their *ideological* characteristic, because only this awareness helps the humans to understand the *development* of these ideas and their *consequences*: their *telos/ reason-to-be* as *ought to be* and their deterring from it, but nevertheless their continuation, duration, by an inertia that makes people and the social reality they live within sick. The inertia of ideas leads to the inertia of the social reality.

Consequently, in order to shake it, the ideas themselves need to be shaken.

### **(17) Kant’s publicity as main element constructing the subjective conditions of the communist transformation**

Kant’s deduction of *publicity*, thus freedom of speech, from within his metaphysical construct, his enlightenment urges and commitment to contribute to the *daring* and *knowledge* of the common people were in line with Marx’s lifelong goal to contribute to the *subjective conditions* of a proletarian revolution – the proletarians being a *world* class within a capitalist *world* system –: the human reason<sup>44</sup> does not accept “cognitive *Untermenschen*”, was both Kant’s and Marx’s warning.

### **(18) Kant’s and Marx’s paradigms**

The breakthrough and demonstrated (philosophical) *principles* rarely appear; in general, the same ideas are discussed and explained according to the new experience.

*The categorical imperative principle is, for ethics, as Darwin’s theory is for biology.* They are *paradigms* for the development of science and human cognition: and cognition never remains only thinking.

Marx, too, was a creator of *paradigmatic principles*:

- the outcome of the historicity of class struggle,
- the necessity of the “dictature of the proletariat” – actually, the takeover of political power by the proletariat – as the essential, absolutely necessary condition for
- the abolition of private property as structural social relation of the modern society (and that never must be confounded with the personal property).

Indeed, *the social condition – that which is the frame of the interhuman relations – to treat the others not only as means but always as ends is just the abolition of the*

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<sup>44</sup> And the feelings – as suffering, first of all – also. Kant showed that, ultimately, the feelings have a basis and justification in thinking, in reason, and his goal was to formalise this rational basis. This basis was obvious for Marx, too. But his scope was to change the social settlements which generate cruelty and suffering. The feelings are individual and random. Can they justify our knowledge that involves and searches for the general and the necessary? No, knowing must take into account the conditions of feelings. Only analysing these conditions can we arrive to general and necessary, thus objective knowledge. Just because the feelings reveal the mediated character of objectivity, Marx focused on the scientific decomposition of the social relations in their development.

*private property*. These are the founding principles, but there are much more. And from this standpoint of paradigmatic principles in society, between humans, *Kant and Marx completed each other*.

*The categorical imperative as ethical formula and the takeover of political power by the proletariat in order to abolish the private property are the most concrete, most functional, most clear and revealing, as ultimate conditions-criteria for the real worth of every human being and of all*. But the achievement of the ethical imperative is *conditioned* by the achievement of Marxian principles. As we see nowadays, apart from these principles, all the slogans and “reforms” are impotent and, concretely, harmful; they waste the time and life of humans. We are justified to say that as the categorical imperative is a *regulative idea of moral*, so the communist idea – as a synthesis of the above principles – is a *regulative idea for the practical life*.

### **(19) The universalizable of Kant and Marx**

Kant brought about the requirement – and principle, since it is a synonym of the categorical imperative – of the *universalizability*, of the *universalizable*. In his turn, by emphasising the social classes, Marx did not support the division and discord of society: on the contrary, he demonstrated the *proletarian* status of the vast majority of the world population, irrespective of the popular “shares” held as crumbs dropped by the *restrictive private control of resources and life*. This proletarian status is the negative of the humans behaving according to the categorical imperative., is the *negative universal*. “Through Kant”, Marx promoted the concrete universalizability. “Through Marx”, Kant signalled that the universalizability is not utopia.

Yes, we must not forget the Kantian meanings of rational beings as both *persons with rights* and *beings without rights*, or of *states with civil society* and *without it (colonies)*; as well as we should consider the cosmopolitan federation of states with civil society only as a model for a world integration of all states; and if so, Kant himself deviated from his epistemological tenet to consider the principles as only forms containing universal and necessary, general prescriptions: would a federation aiming only to forbid a mutual attack of states be accordant with a categorical imperative?

More: the categorical imperative as *universalizable* is discordant with the Kantian rights of states, because these states, or nations, are *groups*. *We cannot posit rights of no matter what kind of groups above the universalizable rights in their moral meaning*. A proletarian taking over of power is not at all an instituting of the rights of a group over the rights of another one. Because the proletariat – denoting the *proletarian feature of all the working people of the world, their dependency on the private control of resources of the whole world* – is *universal*: not in the simple sense that it is a world class, but in the substantive sense that its *purpose* is universal, the abolition of the private property and the establishment of the *public control of resources and social objectives*.

In this respect, Marx's *internationalism* is pendant with the *categorical imperative*: it is the *political imperative* corresponding to the *moral* one. All the humans of the

world are each other's ends *if and only if* they get rid of the internal and international structural relations which determine them to consider each other only as means. Differently put, *if and only if* they construct internal and international structural relations which allow their real social equality and fuel their active involvement in the control of resources and social goals. On this basis, the humans have the *freedom to act according to their thoughts* as aspirations to manifest the *unique creative power of everyone*. On this basis, all the interhuman relationships and feelings can evolve in their complexity marked by the good-evil couple of values which, however, are hindered by the profound restraint to not treat the others only as means. Anyway, *universalism is learned, the closing in groups stops it*.

The Marxist universals – thus, not only the Marxian (that is, created by Marx and Engels) but those created in his/their wake – do not annul the pluralism of cultures. Actually, just this pluralism and its necessity depend on these universals. Can we conceive the development of the specific culture of *every* people in the world, and of *every* human being, without the abolition of the private property, the emancipation of the peoples of colonies and semi-colonies, the rejection of the principle of “chosen” groups and their “historical” “justification” as well as “social” justification, and without expanding social rights on the basis of large social expenditures of the state? *Can we consider historical facts and myths as more important than the categorical imperative?*

## (20) The practical relations of Kant and of Marx

Kant described the practical relations, morally regulated, as *political* and *juridical* relations.

Marx demonstrated that the practical relations are, first of all and obviously through the attitudes of people which are moral in their essence<sup>45</sup>, *economic*. By analysing the *modern market economy* – i.e.,

economy based on *private property* and not on “possession of the rich” or of an abstract citizen preaching the private acquisition as a natural right;

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<sup>45</sup> The *attitudes* are *moral* because they involve the consideration of both the subjects who think and act and the ones who are in any type of relations with the former, and the thoughts and actions as such, according to meanings beyond the strict and direct causality and efficiency, thus according to the *telos* asking *what for* those thoughts, actions, attitudes and relations. Thus, the *moral* characteristic doubles the *practical* character that consists just in the deployment of causal and efficiency evaluation of thoughts, actions, attitudes, relations, institutions, values. The moral evaluation according to the *what for* is practical, too, because it is a reason's level of *content*, but it is *special* in that it is the background of human attitudes; however, its own deployment in the human mind takes place consciously and thus, it is not superposing exactly on the practical. The moral evaluation asks, imposes, requires, but if the social organization imposes practical priorities which are not suitable with the “moral voice” of the conscience, it is silenced (postponed, perverted etc.). This splitting between moral and practice is a question of *contents* of the social ends, means, values, forms, and was emphasized by Marx.

The humans acquired the capabilities of moral evaluation as restraints. The restraints themselves have an instinctual basis of interdependence between humans and thus the restraint to kill other humans, etc. See Konrad, Lorenz, *On Aggression* (1963), Translated by Marjorie Kerr Wilson, New York: Harcourt, Brace & World, 1966.

goal/law of *maximisation of the private profit*;

*competition* between the private property holders and structures, and thus, competition between the wage earners also;

*domination and exploitation of the world* by the states representing the most powerful and advanced private property structures, or modern colonialism (later on called imperialism, or Centre-Periphery domination) –

Marx did not consider it as a deviation from the “former” societies of “society’s control of economy”<sup>46</sup>. And neither did he assess capitalism as a good social arrangement as such, better than the former systems, as Polanyi believed that Marx would have thought in this way, but he stressed the historical role of the modern system:

*to develop the productive forces at a level not only superior to the former productive relations but also and thus at a level no longer supporting the capitalist productive relations, or at a level when the productive relations hinder the development of the productive forces,*

*to globalise economy and civilisation as such* – by generalising worldwide the market economy, science, technology, and mass culture – and thus to create the *objective* basis for a communist society.

And because that globalisation is a *capitalist* one, subordinated to the capitalist pursuing of private profit, it’s obvious that it develops in a *contradictory* and *self-destructive* way for both *economy* and *society*.

## **(21) Judging the mature capitalism and the socialist transition through Marx’s lenses**

Capitalism *separated* economy from social arrangements and considered economy the domain where the rule is exclusively the private profit and that is regulated exclusively by its own rules. Even the social expenditures of the state were only the result of the internal class struggle and the international socialist practice – as in USSR and later, in the East European and Asian socialist countries – of which it was afraid of and hated them, implementing them only depending on the priority of private profit achieved through international extortion and domestic expansion of consumption. Thus, *the idea of self-regulating economy became the tenet of capitalism*, even though the capitalist economy itself needed and needs the state intervention into economy, and even though “self-regulation” determined the attack on the substantive economy, by draining the investments towards the financial “Ponzi system” (this is the so-called *financialisation*). *Financialisation itself is a removal of finance from the logic of substantive economy*, determining also high financial imbalances (raise of debts etc.). Thus, that draining determines the weakening of the former developed substantive economies and accentuates the

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<sup>46</sup> As Karl Polanyi, *The Great Transformation*, Boston, Beacon Press, 1944. And as he thought that Marx would have thought this way.

substantive imbalances of colonies which, after the formal de-colonisation, became “developing countries”. If, with the raise of capitalism, “a social dislocation of stupendous proportions” from the rural to the urban working poor’s exploitation took place, the globalisation of the socially deregulated economy led and leads to another, not amazing but epical dislocation on global scale.

More, capitalism *subordinated society to this economy and transposed the capitalist market rules to the understanding and evaluation of intangible social values*. In this society, the social rules are no longer regulative, thus neither for society nor for economy. So, condemning capitalism from an ethical standpoint – that of the precapitalist economies significantly based on reciprocity and symmetrical gains from exchange – is not efficient at all in order to explain why and how the capitalist rules have been generalised and are general. The fact that economy needs to be controlled by society is not spontaneously fulfilled by society. And the control by the state subordinated to the private profit does represent, although an alleviation of the condition of the many, only an instrument to help the development of capitalism as such.

For this reason, although the former USSR, appeared in a backward country, had to develop in the frame of a world capitalist market, in fact it and the other socialist countries *were not “state capitalism”*. Both USSR and the other socialist countries had to play internationally according to the capitalist market rules, while internally *mixing* this logic with the goal to develop an economy subordinated not only to the *modernisation of economic structures* – and this goal involved both market and non-market rules – but also to the *implementation of socialist values*, even in their communist meaning, *and attitudes* as mutual assessment of men according to their inherent human dignity and social equality: because “the condition of politics” assured this.

Because the *legitimizing values* of the socialist system were not the sanctity of private property and the domination of the “fittest”, but just social justice and equality: this system was, indeed, the first phasis of the construction of the post-capitalist society, as Marx, from the *Economic and Philosophic Manuscripts of 1844* to the *Critique of the Gotha Program*, showed. Simply, socialism. Not “state socialism”. Can we not see that the huge economic state intervention in the capitalist societies – including by sponsoring the culture and mass education – was and is not tantamount to “socialism”, just because of the *values* and *ends* of these *different kinds* of state interventionism? And can we not see that the capitalist state intervention did not solve the problems of meaningful lives of their population? Can a meaningful life be that of consumption and selfish “survival”?

The socialist values had both a socialist aspect – responding to the objective requirements of the construction of a new society *within the old one* – and a communist aspect: where equality meant – as in Kant – equality *qua* human being. Of course, we don’t have to and we don’t need to idealise the first socialist practical experience and, letting aside the concrete evolution of this experience, the mixing of values themselves in the real life. But just following the new legitimating values, the social justice was – and not as a desire or a prescription for the future – “an egalitarian politics *in actu*”. And the socialist politics was just this: with all

its shortcomings. Therefore, the “condition” of a socialist politics reflected the Cartesian and Kantian equal endowment with reason of all the human beings.

In this, the socialist politics – substantiated by Marx – is both the *surpassing* of Kant's image about the possibility of justice (as equal social rights) in a society based on capitalist political and juridical freedom of citizens, and the *continuation* of his moral requirements as the real foundation of politics and society. A very difficult continuation, because of the opposition of the capitalist forces worldwide through a model in which no one is responsible. And in which the “horror beyond description” (Mazin Qumsieh, <http://www.defenddemocracy.press/please-end-extermination-campaign/>) is covered by the consumption and spectacle annihilating the conscience of the real and fake privileged, and in which even Orwell's “newspeak” is incredibly exceeded.

But Kant's historical limits do not affect the value of the categorical imperative. On the contrary, they emphasise it.

## **(22) Kant's categorical imperative as a call for Marx**

However, this principle demands to be surpassed. In ethics, Kant made a *revolution*, but in morals Kant is only a *call for Marx*: for the real understanding of the *value* of every human being, an explicit theory of the *concrete integral development of society* is needed. Kant did not subordinate the multi dimensions of the humans to rationality (as his critics say), but he explained the *cognitive* basis of these dimensions and their *moral* basis. Marx is not superior to Kant because he considers all of these dimensions, but because he explains their *interdependence* and their *dependence on the economic structural relations*. And because his principles, conclusions of the fathoming of the real, highlight frames (“forms”) realised and fulfilled by all people and by all peoples. They give the *contents* of the regulative idea of communism, inventing also their *forms*. Essentially, these contents with forms cannot annul the Marxian paradigms because, indeed, “the content of every human act has to do, ultimately, with the production-reproduction of human life in community”<sup>47</sup>.

But concretely, the real conditions determine the problems, their understanding and thus, the rhythms, the priorities, the scales, the phases, the means, the correlations between tactical movements and strategical tendencies, in a word, the *methodology*. For instance, according to the Marxian original theoretical demonstration, where the contradictions are sharper, there they are more acutely felt and thus, the revolution occurs. However, as it was shown by history, not this was the case, because the West is not only the “fatherland” of modernity and its development as the master of the world capitalism but also its *show-window*, the welfare and the dominant ideology paid by the Western capitalism stopping the process of social awareness.

Therefore, not the sharper *structural* contradictions between the productive

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47 Enrique Dussel, “El reto actual de la ética: detener el proceso destructivo de la vida”, pp. 143-152, in Heinz Dieterich, Enrique Dussel, Raimundo Franco, Arno Peters, Carsten Stahmer, Hugo Zemelmann, *Fin del Capitalismo Global. El Nuevo Proyecto Histórico*, Mexico, Tlalaparta, 1999, p. 143.

relations – requiring the socialisation of the means of production which are private, restrictive – and the productive forces, including science and technology, which are highly socialised, led to revolution, but on the contrary, the sharper *principal* contradictions between the colonised and semi-colonised peoples and the Western colonisers evolved in semi-peripheries and peripheries. But all of these contradictions intermingle. The more so because the Western capitalism is the *mirror* of the structural contradictions and their results: the level of scientific and technological discovery is huge and, at the same time, its application is perverted, the Western decision-makers generating war, famine and malnourishment, destruction, complex ecological crisis even to the point of no return, raise of irrational and absurd beliefs, ignorance, fear and reduction to the fight for survival. Today, the world is confronted with the globalised capitalism in its *neo-liberal and system crisis* stage. It's obvious that the difficulties are much bigger than a century ago. First of all, the hegemonic role on the conscience of the world proletarians is what must be defied. And in this process, Kant's categorical imperative is a beacon.

### (23) Kant and Marx confronting the necessity

Both Kant and Marx signalled the future, a society *à venir*, if we use Derrida's expression for democracy. Both were moderately optimistic. But while Kant's moral metaphysics can be seen by a common non-philosopher as an abstract desire, Marx's theory is, indeed, the *key* for his *active* propensity: more than a hope, a *practical method*. That is only a sketch, continuously evolved in reality by all the humans *à venir*.

Kant's moral categorical imperative signalled a new moment of the concept of *necessity*: to treat all the humans as ends, and not only as means is the *sine qua non* condition of the persistence of humanity. Marx's principle of political revolution in order to destroy the cause of considering the humans as means and not as ends, was and is the *sine qua non* condition of the fulfilment of moral necessity. Kant gave the frame of necessity. Marx's principle showed the possibility of the frame.

If so, "Marx" means not only the Marxian theoretical breakthrough but also and essentially *the Marxist thinkers* who pursued it: and first of all, Lenin, because he first put the principle of the communist revolution into practice, showing that *it's possible*. The practical process emphasises another relation between the philosophical concepts of *possibility* and *necessity*: revealing that necessity requires a deviation from it, just in order to fulfil it. Necessity is strict, possibility is open, because otherwise the necessary frame cannot be accomplished. This is the *originality* of the creation of possibility: the Leninist and Stalinist "socialism in a country", the Cuban "unique experiment in Latin America", the Chinese, North Korean and North Vietnam "people's republics", the present "socialism with Chinese characteristics", are the *original creation of possibility*. The realisation and sustainability of communism requires and implies the awareness of its *necessity* by the proletarians of the whole world. Possibility is *positive*<sup>48</sup>, it shows how necessity

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48 Kant pointed out positive means to apply knowledge into practice, "to extend the boundaries of sensibility... beyond everything, and so even to dislodge the use of pure (practical) reason", while

is accomplished, despite all the obstacles, while the world proletarians are only in the *negative* phase where they do not yet criticise the dominant “use of reason” and accord with this use, seeing only *that which is not* but it is *presented to them as knowledge*: so, where they only learn to distinguish these.

This de-phasing/disjunction of phases between *the negative that deprives possibility* and the *original struggle for necessity* is the mark of our epoch. Theoretically, necessity makes, ultimately, the world. Practically, its process is open: even to its destruction, because of the destructions of so many lives. *Theoretically, the human life is sacred, and this assumed principle by all is and leads to the moral principle of universalizability*. This means, according to Kant, that not reason is specific to the human beings – there are other beings on the Earth also thinking – but the *moral* reason. And the moral reason is that which gives the unique specificity to all rational beings in the universe<sup>49</sup>. *But in the practical surrounding us, we see that the human life is not sacred*.

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negative is to remain only within the boundaries of theoretical knowledge, or of sensibility”, Immanuel Kant, *Critique of Pure Reason*, Preface to the second edition, Bxxiv, p. 114.

49 For this reason, the contemporary dominant ideology spreading fear of “aliens invading the Earth” is ridiculous: can we imagine extraterrestrial civilisations able to undertake trips inter galaxies but devoid of “the moral law within” every individual being constituting these civilisations? Since the moral law raises just “the worth as an intelligence” made by everyone’s pursuit of the reason-to-be of intelligence as such, thus by everyone’s pursuit of the common good of all moral beings in the universe, can we imagine the extraterrestrial civilisations as alike the capitalist logic of survival of the “fittest”, meaning strongest? Do we not rather understand that the fear of aliens is the transfer from the *homo homini lupus* relations in order to divert the general attention just from these relations? The quotes from Kant are from *Critique of Practical Reason* (AA 5: 162), p. 129.

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# RedMed

## www.RedMed.org

### RedMed and Christian Rakovsky Centre on the move!

RedMed (short for Red Mediterranean) was, until recently, a web site that published news, opinion, commentary and political declarations from around the Mediterranean Sea, the Balkans, the Middle East, the Black Sea region, Transcaucasia, and the broader Eurasian region. It has now been transformed, as of the beginning of 2020, into a centre for propagating socialist thinking, carrying commentary and political statements and publishing various journals from the Mediterranean region all the way to Russia and the former Soviet Union.

RedMed used to work hand in hand with the Balkan Socialist Centre Christian Rakovsky to establish links between socialists and revolutionaries from these regions. However, parallel to the expansion of RedMed, the Christian Rakovsky Centre also broadened its remit. Over time three Russian organisations became members of the Christian Rakovsky Centre: the OKP (United Communist Party), the RPK (Russian Party of Communists), and the Association "Soviet Union", in addition to the original members, two political parties of two Mediterranean countries, EEK (Workers Revolutionary Party) of Greece and DIP (Revolutionary Workers Party) of Turkey. Thereupon the centre changed its name to the International Socialist Centre Christian Rakovsky.

RedMed is now publishing on a bimonthly basis both the Communist of Leningrad, journal brought out for quite some time in Russian by the RPK, and Soviet Renaissance, a new online journal in Russian prepared by the Association "Soviet Union". This is in addition to its already established commentary and political statements on world affairs in many different languages, first and foremost in English, but also French, Italian, Greek, Turkish, Russian, Farsi and Arabic.

RedMed welcomes letters, comments, news about struggles, debates and material in different languages. We would appreciate very much if people would volunteer translating the different articles and declarations that we publish in the web site into their native tongue.

Let us join hands to bring down the yoke of imperialism and capitalism in Europe, in Asia, in the Middle East and North Africa, and across the world.



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# Why a drive to a Global War Armageddon -and How to Defeat it<sup>1</sup>

Savas Mikhail Matsas

1. The imperialist drive to a global war Armageddon shapes the world situation bringing humanity to the brink of the abyss. In an uneven but combined way, it is advancing from the center of Europe to the Middle East, from the Baltic and the North Sea to the Red Sea, from the Atlantic Ocean to the Indo-Pacific preparing to enter the South China Sea.

The inflection point of history, the famous *Zeitenwende*, according to German Chancellor Olaf Scholz, was in 2022, when exploded in Ukraine the conflagration provoked by US led NATO imperialism with post-Soviet Russia for domination in the former Soviet space and with ultimate target China, recognized by the US as its “primary strategic rival” for world hegemony.

The following year, after the Hamas-led “Operation Al Aqsa Flood” on October 7, 2023, the on-going war in Ukraine became combined with the genocidal war waged by the far-right Zionist regime against the Palestinian people in Gaza, a mass massacre fully supported by US imperialism, the “collective West” and their stooges

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<sup>1</sup> This article was originally presented at the Third International Trotsky Event held at the Department of Economics of the University of Buenos Aires between October 22nd-26th.

in the region. The Zionist ethnic cleansing rapidly extended to the West Bank, and to all occupied Palestine. In 2024 it escalated further in the massive bombing and the seventh barbaric ground invasion of Lebanon. In the same period, non-stop war operations engulfed the entire region, with bombings, a campaign of assassinations of the leaders of Hamas and Hezbollah, Zionist military attacks, assisted by US, British, French, EU naval and air forces against the “Axis of Resistance” in Yemen, Syria, Iraq, aiming particularly at and clashing with Iran with incalculable consequences spreading chaos not only regionally but world-wide.

2. Both in the Middle East and in Europe, the war appears escalating and endless.

After a thousand days of battles in Ukraine, no end is in sight. The conflagration continues despite the vast devastation of the country, reduced to a ruined military bastion and a colony of Western imperialism, despite the growing rivers of blood of Ukrainian and Russian people, despite the deepening of the world capitalist crisis produced by the war, with dramatic effects especially in the Global South but also in the Global North, particularly in Germany and the EU but also in the deeply divided America. The so-called “Ukraine fatigue” among the instigators of the war in the West is fed by enormous financial, social and political costs, the Ukrainian military reversals at the fronts, the resilience of the Russian war economy despite the sanctions. There is a lot of speculation that a possible re-election of Trump as US President will bring an end of the war with negotiations with the Kremlin. Historical development is not linear, and all kinds of zigzags could evolve. But nobody should ignore the contradictory tendencies and strategic needs behind the US-NATO war drive. The expansion of NATO to the East up to the borders of Russia started from the Day 1 of the disintegration of the USSR.

The Ukrainian historian Serhii Plokhy, now at Harvard University, an academic far from any suspicion for communist or even pro-Russian sympathies had rightly stressed: “*The former Soviet space remains a tinderbox, still reckoning with **the dissolution of the Soviet Union, which should be thought of not as an event but as a process***”. In November-December 2021, the time that US and NATO rejected a Russian proposal for negotiations to avoid a war on Ukraine, an essay by Michael Kofman and Andrea Kendall-Taylor was published in *Foreign Affairs*<sup>2</sup>. They quote Serhii Plokhy’s above mentioned estimation, stressing: “***Even if China proves to be the more significant long-term threat, Russia will remain a long-term challenger, too***”

Then an important and puzzling question is raised by the *Foreign Affairs* authors: “***Why have the victors of the Cold War lost the post-Soviet peace?***”

They insist that the “process” unleashed by the 1991 disaster had to go to its completion.

Zbigniew Brzezinski, in the aftermath of the demise of the USSR, had developed an entire geopolitical doctrine, published in 1997 as *The Great Chessboard*, stressing that the demise of the USSR was not sufficient for the strategic needs

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<sup>2</sup> Michael Kofman and Andrea Kendall-Taylor, “The Myth of Russian Decline: Why Moscow Will Be a Persistent Power, *Foreign Affairs*, November-December 2021.

of US imperialism. To eliminate forever the “threat”, Russia and the entire former Soviet space had to be fragmented and subjugated. The developments that followed show that the paranoid Brzezinski doctrine has not died with him but officially it is endorsed and put in practice by all US administrations and NATO.

In 1929, Trotsky had made a warning more actual than ever: the process of capitalist restoration in the former Soviet Union cannot be a return to the conditions of pre-1917 Russian capitalism with or without a Czar<sup>3</sup>. It would be completed by its fragmentation, colonization by Western imperialism, and rule by a stooge semi-fascist regime. A warning which applies not only to Zelensky’s Ukraine celebrating the Nazi collaborator Stepan Bandera and today’s Nazis, not only to the entire former Soviet space but to China as well.

The central historical dilemma posed in the NATO proxy war in Ukraine is: ***either completion of the 1991 disaster or its revolutionary reversal, and a renaissance of genuine Soviet power. The latter is viewed as the main common threat both to imperialism and to the Russian Bonapartist regime of oligarchic capitalist restoration.***

3. The other exploding volcano, the endless Zionist war nightmare in the Middle East cannot be “pacified” by hypocritical American, British, and European calls for “a ceasefire and negotiations” after the killing of the leader of Hamas, Yahya Sinwar, presented as the “architect” of the 7th of October armed operation.

The often publicly-declared plan of Zionist expansionism is to impose a so-called “***New Middle East***” by eliminating the Palestinian national question, crushing by all means Palestinian and all popular resistances and anti-imperialist obstacles in the region. The plan has the full political-military and financial support of US imperialism, with the complicity of the EU and of the Arab reactionary regimes.

In September 2023, a few weeks before the Gaza war, Netanyahu presented at the UN the map of this “New Middle East”, where Palestine has disappeared, replaced by Israel from the river to the sea uniting the Indian Ocean and the Gulf with the Mediterranean and Europe, disrupting the “new Silk Road” of China. A few days after Netanyahu, US National Security Adviser Jack Sullivan supported the plan and praised the new era of Middle East... “stability” and “peace”. Then the hell of war erupted. Following a year of an escalating war of genocide, Netanyahu again, at the UN promoted the same plan, presenting the same map and counter-posing it as a colorful “blessing” to the black “evil” forces around Iran at the head of the “Axis of Resistance”.

The new Israeli invasion in Lebanon is part of this plan to reconfigure the Middle East, after the serious blows given by murdering the leaderships of Hezbollah and Hamas, and in preparation of the direct confrontation with Iran.

In an essay at the weekend edition of the *Financial Times*, on October 19, 2024, titled “Israel, Lebanon and the mirage of the new Middle East”, Lebanese academic and diplomat Ghassan Salamé warns:

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<sup>3</sup> Leon Trotsky, *Can Bourgeois Democracy Replace the Soviets?*, Writings 1929, New York: Pathfinder Press.

Starting the re-engineering of the region with an incursion in Lebanon has, in particular, been a curse for Israeli politicians: Begin and his defense minister Ariel Sharon had to resign after their 1982 large-scale invasion of their northern neighbor, which had been justified in terms very similar to Netanyahu's now. Shimon Peres was defeated in the elections that followed his 'grapes of wrath' campaign of 1996 and Ehud Olmert's misadventure there in 2006 combined with corruption cases to bring about his downfall. The repeated promise of a 'new Middle East' after each of these invasions has naturally not seen daylight.

Nevertheless, the Zionist settler colonialism, at the advanced stage of its brutalization and internal crisis, moves in that direction. In today's world historical conditions, it will be not just a repetition of past failures, but possibly a qualitative leap in the implosion of the Zionist colonial project itself.

Running to catastrophe, its dystopian plan converges with the strategic needs of US imperialism to reverse its decline and reconfigure its crumbling hegemony in a world shaken by an insoluble global capitalist crisis.

The US-led NATO war in Europe and the US-supported Zionist war in the Middle East are interlinked, in a unity of their diversity. They are ***crucial different moments of the same uneven and combined world historical process.***

To paraphrase Trotsky's words on Hitler, in the 1940 "Manifesto of the Emergency Conference of the Fourth International", through Netanyahu with his fascist allies Ben Gvir and Smotrich "world capitalism, driven to desperation by its own impasse, has begun to press a razor-sharp dagger into its own bowels."

4. Usually, the current global imperialist war drive is viewed and analyzed *solely in political and geopolitical terms*, as rivalry between Great Powers forming around them antagonist blocs of States, military expansionism, competition for material resources and markets, for geo-economic hegemonic position in the world market. ***The primary source, the historical development of the driving contradictions and contradictory tendencies within the mode of capitalist production itself, prevailing in the world economy and determining at the last instance world politics remain invisible.***

Marx has brought into light these driving contradictions of capital, the intensifying contradiction between its "tendency to universality" clashing with the internal and external limits of the capital relation<sup>4</sup>, and driving the transition beyond capital as a "self-abolishing contradiction".

Lenin, in the debates on imperialism during World War I insisted against Kautsky that imperialism is not just a policy but ***an epoch of historical development of world capitalism, an epoch of transition from a "decaying", "parasitic", "rotten", "agonizing" capitalism - the adjectives are Lenin's- to Socialism.***

Lenin also warned against any formal, a-historical misuse of the well-known definition of the five economic features of imperialism: "...imperialism can and must be defined differently if we bear in mind not only the basic, purely economic

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<sup>4</sup> Karl Marx, *Grundrisse*.

concepts -to which the above definition is limited- but also the historical place of this stage of capitalism in relation to capitalism in general, or the relation between imperialism and the two main trends in the working class movement”<sup>5</sup>, namely the opportunist and the revolutionary trend.

(See our previous contribution, in 2024, on the occasion of the centenary of Lenin’s death.<sup>6</sup>)

It is this most important historical-dialectical materialist approach to modern imperialism as an epoch of capitalist decline, which is most commonly ignored, rejected, or, in some left currents just mechanically repeated as a ritualistic formula, emptying it from its dialectical content and ever-developing dynamics.

Rejection as false or obsolete of Lenin’s concept of imperialism as declining capitalism was prevailing in the post-World War II period of the Keynesian Bretton Woods settlement, and after its collapse, during the forty years of neoliberal-finance capital globalization. But after the 2008-world Crash and the global financial crisis, the Great Recession, the failure of Neo-liberalism and the eruption of the international war in Europe disrupting the global supply chains, mainstream bourgeois discourse is dominated by debates on “*de-globalization*”, “*de-coupling*”, “*de-risking*”, “*friendly or home-shoring*”, and anxiety about global trends of disintegration. These are not debates in the abstract, but they go together with growing practices of economic nationalism, protectionism and trade wars.

Fragmentation or integration tendencies prevail in the world economy and politics today? A mechanical separation between opposite trends, or impressionistic approaches to global shocks and disruptions in world trade can only compound the prevailing confusion. They reveal, rather, the shortcomings, even the failure of mainstream bourgeois economics amid an unprecedented, insoluble global systemic-structural crisis producing successive shocks. It cannot grasp the contradiction of a capitalist globalization in crisis appearing simultaneously as ending and endless.

Global trends of fragmentation and integration cannot be arbitrarily separated. Permit us to quote:

***Fragmentation collides with the reality of an already established integration of international social economic life, the already advanced interconnectedness of world social economic processes, which, at the same time, in its present historical-social form generates further fragmentation.*** This “double bind” is the unsolved Sphinx riddle of the present.<sup>7</sup>

Precisely this “double bind” is the sharpest expression of the insoluble crisis of a social mode of production in ***historical decline***.

US capitalism is the highest point of the historic development of global capitalism. Its manifest decline now, making it the center of the global crisis, expresses not

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5 V. I. Lenin, *Imperialism, the Highest Stage of Capitalism*, Chapter VII. “Imperialism as a special stage of Capitalism”, [www.marxists.org/archive/lenin](http://www.marxists.org/archive/lenin)

6 Savvas Michael-Matsas, “*Imperialism, War and the Permanent Revolution*”, International Conference on Lenin by the Center “Christian Rakovsky”, 21 January 2024.

7 Savvas Michael-Matsas’ presentation in the *Saint Petersburg Economic Congress 2024* dedicated to this important question.

solely the decline of a national capitalist Great Power to be replaced by another as a global hegemon. It is the deepest point reached by declining global capitalism. As Trotsky had predicted *Americanism can be replaced only by world Socialism.*

Modern capitalism has advanced, in our epoch, two main political-economic strategies – Keynesianism and neoliberalism with all their variations - to avoid a repetition of the great disasters and convulsions of the 20<sup>th</sup> century, a repetition of the 1929 Crash, the Great Depression with all their explosive political consequences- revolutions, fascism, world war. After the collapse of the post-World War II Keynesian order in the early 1970s, the decades of neoliberal world-wide offensive has failed as well in 2008. Despite the “heterodox” emergency measures of quantitative easing and stimulus packages, the empirical defensive tactics return into boomerangs. Mainstream bourgeois economics is at a dead-end to confront the ongoing global crisis. This total confusion is what is currently called by some “radical uncertainty”, by Adam Tooze “cognitive dissonance”, or, by well-known others “libertarian anarcho-capitalism”. *Capitalism lacks now a real alternative long-term strategy of exit* out of the still insoluble post-2008 global crisis, which is moving through convulsions from one shock to another worst and unexpected shock. The inability of the system to face the climate catastrophe, manifested dramatically by the global pandemic shock of 2020, is a clear manifestation of the exhaustion of the capitalist form of social metabolism of human society with Nature.

It is this historic strategic impasse that global capitalism in its imperialist decay tries to break *manu militari*- by means of global war.

5. The ruling class knows very well, as Trotsky pointed out the truth of Lenin’s line: “The main enemy is at home”. For this reason, militarization and war economy go together with growing State authoritarianism, growth of the far right and rising fascism. Xenophobia against the migrants, racism of all kinds, hatred of the socially excluded and marginalized, all means are used to mobilize the impoverished in a war against the poorest and weakest, for the benefit of a tiny super-rich minority on the top of the world.

The structural inability of the ruling class to politically manage the uncontrollable social economic “perfect storm” destabilizes all bourgeois political systems, producing constant regime crises, or to use Michel Foucault’s term a “crisis of governability”, poses the question of the struggle for political power itself: what social class force fighting against what enemy and how it can open an exit out of the impasse of permanent disaster? Who, whom?

As on the eve and the beginnings of the First and Second World Wars, now under the specter of a Third World War, the vast majority of the international Left as an organized political expression of the working class and the impoverished popular masses has *failed* the acid test posed by the challenges of our times, particularly in front of the threatening global war Armageddon.

There is an adaptation to the powerful pressures of imperialism taking various forms and degrees, either as a direct capitulation and alignment or as an “equidistant” position between two “equal evils”.

NATO’s primary aggressive role in Ukraine in a war for colonization and

fragmentation of the former Soviet space is ignored together with the central question: ***imperialist completion of the 1991 disaster or revolutionary reversal of it?*** The latter is a task which cannot be achieved by restorationists and Kremlin Bonapartism negotiating with imperialism for a Minsk 3 but by defeating NATO and creating the conditions for a rebirth of a genuine Soviet power that will expropriate the oligarchs and defeat capitalist restoration advancing the socialist unification of the European Continent from Lisbon to Vladivostok, without capitalists, oligarchs or bureaucrats.

In the Middle East and the Global South, it is impossible for revolutionaries to keep an “equidistant position” between butchers and victims pretending that Zionism and the popular armed resistance to the genocide are both reactionaries. No revolutionary can ignore that the imperialist epoch as Lenin stressed is marked by the division between oppressor nations and the oppressed. At the same time no revolutionary internationalist force should disregard that this oppression is refracted through the class divisions within the oppressed nation, making absolutely necessary, in the liberation struggle the political independence of the working class and its vanguard fighting for the permanence of the revolution.

To navigate in the tempest of our times, ***a creative Marxist theory of the epoch is the necessary compass for orientation.*** And it is well known that after the collapse of the USSR, dominates, as Alain Badiou has aptly called it, “a general disorientation of the world”.

Lenin had called our epoch “an epoch of wars and revolutions”. Apart from regional or local wars and revolutionary uprisings, it will be right to remark that the epoch opened by the First World War and the October 1917 socialist Revolution as the epoch of ***world wars*** - two already happened in the 20<sup>th</sup> century and a third is becoming a visible menace in the 21<sup>st</sup>-- ***and of the world socialist revolution.*** The latter moved outside of the political horizon of mass consciousness and particularly of the Left after the demise of the USSR and of the so-called “actually existing socialism”.

“Revolution seems always impossible”, the great revolutionary Leon Trotsky warned, “until it becomes inevitable”<sup>8</sup>. Revolution is constantly repressed by a dominant social order – and it permanently comes back in an unexpected Return of the Repressed. It is not an arbitrary or contingent disruption of the status quo. It is driven, as the Marxian historical materialist dialectics has discovered, by unsolved material contradictions leading into an explosive manifestation of the deepest needs of the actual social life process itself.

As we have argued on another occasion<sup>9</sup>, in *Trotsky em Permanência* in 2021:

the Concept of Permanent Revolution reflects bourgeois modernity, evolving and maturing throughout its entire historical development. From the epoch of bourgeois ascent, when, in the Great French Revolution “The world struggle of the

<sup>8</sup> Leon Trotsky, *History of the Russian Revolution*.

<sup>9</sup> Savvas Michael-Matsas, *Trotsky's Permanent Revolution in the 21<sup>st</sup> century*, Encuentro Trotsky II online- Trotsky em Permanência- 2 a 6 agosto de 2021 Simpósio Temático 9, August 6, Sao Paolo, Brasil.

bourgeoisie for domination, for power, and for undivided triumph found its classical expression”<sup>10</sup> to the Jacobin call for *Révolution en permanence*, to the apogee and turning point of capitalism, in the middle of 19<sup>th</sup> century with the European Revolution of 1848 and the 1850 Address by Marx and Engels, till the imperialist epoch of capitalist decline and Trotsky’s theoretical re-elaboration of Permanent Revolution in the 1905 Russian Revolution, its vindication in 1917 and its later developments in the struggle against Bukharin’s and Stalin’s doctrine of “socialism in a single country” [...] *Permanent Revolution becomes the dialectical self-reflection of the epoch.*

This the dialectical red thread in today’s labyrinth of contradictions.

It should be the Marxist theoretical **guide** for our international revolutionary action and the **strategic** line in our struggle to defeat imperialist war.

It does not forbid **tactical flexibility** in relation to peace movements making the distinction between the genuine hatred of war by the popular masses and the hypocritical imperialist bourgeois pacifism. The same applies to solidarity with anti-imperialist resistance and liberation movements in the Global South, including the Axis of Resistance in the Middle East. These tactics should be subordinated and serving the strategy of the world socialist revolution, keeping always our political and class independence and the right to criticism.

Without the masses in action no revolution is possible. To raise their political consciousness and action, to respond to the challenges of historical times, the most advanced detachments of the international working class and of the oppressed need to be organized and trained in **revolutionary parties of a revolutionary International.**

We must remain “faithful to our fatherland in time” as Trotsky said: to the deepest demands of our epoch and urgently fulfill the tasks to make the Revolution Permanent until its victory all over a world in flames.

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<sup>10</sup> Leon Trotsky, *Results and Prospects*, 1906.

# **Twentieth Congress of the CCP, wave of social unrest in November 2022, and the future of China**

Burak Gürel

The 20<sup>th</sup> Congress of the Chinese Communist Party (CCP) was held between October 16<sup>th</sup> and October 22<sup>nd</sup>, 2022. The Chinese bourgeoisie and the state entered this congress under rapidly deteriorating domestic and international conditions. The slowdown of the Chinese economy due to the impact of the third great depression of the world economy that began in 2008 and the COVID-19 pandemic that started at the end of 2019, along with the increasing economic and geopolitical tensions between China and advanced capitalist, i.e., imperialist, powers are putting increasing pressure on the CCP leadership. Xi Jinping, who sees the path to overcoming these problems in a personality cult-based dictatorship, managed to get elected as the General Secretary for the third time. Thus, just like Mao Zedong, he opened the way to stay in power until death. However, as labor and social unrest erupted across the country immediately after the 20<sup>th</sup> Congress, Xi's victory did not offer a magical key to solving the enormous problems facing the People's Republic of China (PRC). The escalation of tensions between China and imperialism could lead to a nuclear war and plunge humanity into disaster. A prolonged stagnation of the Chinese economy could provide significant opportunities for the struggles

of Chinese workers and oppressed people, which seem to have been temporarily subdued by Xi's repressive policies but have shown signs of resurgence immediately after the congress. This article goes beyond a standard congress analysis and points out positive and negative possibilities for the future. It starts with a balance sheet of the problems that Xi encountered when he became the CCP General Secretary and the PRC President a decade ago. The article then examines whether Xi's actions have provided a remedy for these issues. Then, it encapsulates the congress process and decisions. Based on this analysis, the article concludes by drawing attention to the risks and opportunities facing the workers and oppressed people of China and the world.

## China before Xi Jinping

### *The rise of labor unrest*

Between 2002 and 2012, China was governed by Hu Jintao-Wen Jiabao duo. They handed over their positions to Xi Jinping and Li Keqiang in the 18<sup>th</sup> Congress of the CCP, held in November 2012. The Hu-Wen era witnessed three interconnected significant developments.

The first development was the rise of the Chinese proletariat, which extracted significant concessions from capital. The composition of China's industrial proletariat dramatically changed during the capitalist restoration from 1978 on. A large labor force willing to accept precarious and low-paying jobs was needed to attract foreign capital and support the native bourgeoisie that emerged from within the CCP bureaucracy. It was challenging to impose these conditions of servitude on the urban proletariat, which had a relatively strong class consciousness and capacity for struggle inherited from the Maoist era. Therefore, the household registration (*hukou*) system, which had hindered rural-to-urban migration, was relaxed. The number of "peasant workers" increased from 67 million in 1985 to 150 million in 2000, reaching 285 million in 2017. Based on this enormous supply of cheap labor from the countryside to the cities, domestic and foreign capital earned tremendous profits in the 1980s and 1990s.<sup>1</sup>

Furthermore, in the late 1990s and early 2000s, many large state-owned enterprises (SOEs) were restructured or privatized. Approximately 50 million workers, who previously enjoyed job security, relatively satisfactory wages, and decent employment-based welfare rights and services, were laid off because of privatization.<sup>2</sup> Despite facing significant resistance, especially from the workers in Northeastern provinces, the privatization policy was implemented. This restructuring process might have faced much more severe difficulties without the

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1 Burak Gürel and Mina Kozluca, "The Unrest and Relative Empowerment of the Working Class in Contemporary China," *METU Studies in Development*, vol: 46, no: 2, 2019, p. 205.

2 Burak Gürel, "Dünya Kapitalizminin Krizi ve Çin'in Yükselişi," *Devrimci Marksizm*, no: 13/14, 2011, p. 26.

flow of millions of migrant workers to the cities.<sup>3</sup> In short, the process of capitalist restoration was completed thanks to the presence of a massive migrant labor force, and it was on their shoulders that it primarily relied upon.



**From left to right: Hu Jintao, Li Keqiang, Xi Jinping, Wen Jiabao (March 17, 2013)**

On the other hand, the second generation of migrant workers who entered the workforce in the late 1990s and early 2000s waged struggles to change the conditions of exploitation they faced. Despite the ban on forming unions other than the party-state-controlled All-China Federation of Trade Unions and all forms of state violence and repression, migrant workers established factory committees, NGOs, and solidarity networks, leading to thousands of extra-legal strikes and protests. As seen in the uprising in the Zengcheng district of Guangzhou province in June 2011, the actions of workers and the oppressed sometimes transformed into brief mass uprisings.<sup>4</sup>

In response to rising labor militancy, the Hu-Wen administration used a mixture of repressive and conciliatory measures. In addition to mobilizing the police to suppress strikes and demonstrations, the Hu-Wen administration sometimes approved and even encouraged capital to provide material concessions to the workers. In 2008, the Labor Contract Law was enacted, bringing some improvements to the social rights of migrant workers. Although there was pressure on labor NGOs, they were not outright banned. Additionally, to prevent workers' radicalization, the All-China Federation of Trade Unions was strengthened, and it was allowed to intervene in (at least) some of the workers' struggles to secure pro-labor concessions.<sup>5</sup>

<sup>3</sup> Isabella Nogueira and Hao Qi, "The State and Domestic Capitalists in China's Economic Transition: From Great Compromise to Strained Alliance," *Critical Asian Studies*, vol. 51, no. 4, 2019, p. 563.

<sup>4</sup> "Çin'de Sınıf Mücadelesi Sertleşiyor," *Gerçek*, no: 21, July 2011, p. 11.

<sup>5</sup> Gürel and Kozluca, pp. 216-218.

As a result of these efforts, real wages in China increased much faster than in the rest of the world. Each new gain sparked further struggles, leading to a continuous cycle of workers fighting for better rights and conditions.

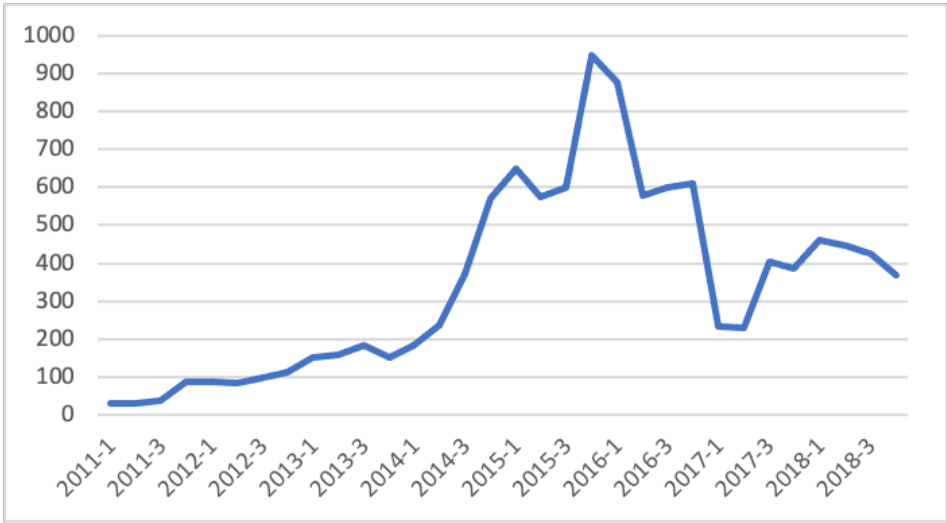


Figure 1. Strikes and other forms of labor unrest in China, 2011-2018<sup>6</sup>

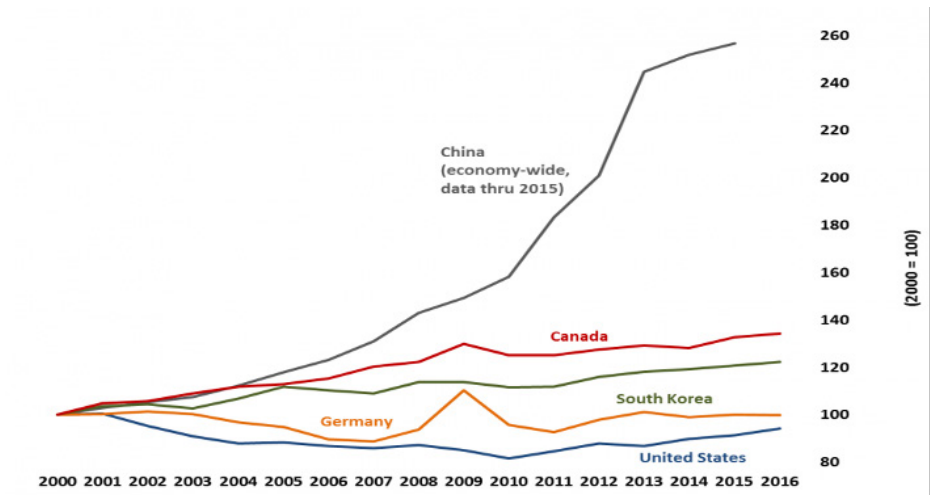


Figure 2. Indexed unit labor costs in China, Canada, Germany, South Korea, and the United States, 2000-2016 (2000=100)<sup>7</sup>

6 Ibid., p. 211 (The table displays quarterly figures for each year).

7 <https://acetoool.commerce.gov/cost-risk-topic/labor-costs> (accessed March 1, 2019).

The Hu-Wen administration also made significant concessions to the rural population. To appease the rising peasant struggles in the 1990s, the CCP (under Jiang Zemin's leadership) promised to abolish agricultural taxes and fees and compulsory rural labor practices. The Hu-Wen administration fulfilled this promise in 2006. In the same year, the "Building a New Socialist Countryside" campaign was launched, leading to increased agricultural incentives and subsidies. The compensation paid for rural land acquisitions (to supply land to industrial, real estate, and agribusiness capital) also increased during this period.<sup>8</sup>

These measures were aimed at addressing some of the grievances of the rural population and enhancing the socialist rural development narrative. However, it is necessary to note that while these policies brought some relief to the rural population, they also had limitations and did not fully address the broader structural issues faced by the rural communities in China. Despite these concessions, rural-urban income disparities, land dispossession, and social inequality remained persistent.

### ***The effects of the Third Great Depression***

The high-speed growth of the Chinese economy from the 1980s to 2008, often with double-digit annual figures, formed the material basis for the concessions given to workers and peasants during the Hu-Wen era. However, the onset of the third great depression of the world economy in 2008 put enormous pressure on the Hu-Wen administration. As Western imports from China suddenly decreased, around 25 million migrant workers were laid off in export-oriented industrial zones, especially in the Guangdong province, in October 2008.<sup>9</sup> Those layoffs triggered a significant increase in labor protests. After the 2008 crisis, there was a noticeable tendency towards left-wing radicalization among the youth, with the idea of communism (primarily Maoism but also other Marxist currents) becoming popular again.

To maintain economic and political stability, the Hu-Wen administration unveiled a 586-billion-dollar stimulus package in November 2008 to revitalize the economy. This amount was equivalent to 12.5% of China's national income and three times the amount spent by the United States for the same purpose. When the expenditures made by state-owned banks and local governments were added, state spending to boost the economy reached 27% of the national income in 2009.<sup>10</sup> Large-scale infrastructure investments were made nationwide, especially in relatively poor Western provinces. Additionally, the debts of many companies were deferred or written off. The state capitalist characteristics of the Chinese political economy, defined by the state's dominance in critical sectors such as banking, energy, and telecommunications, helped the PRC to maintain significant economic planning and implementation capacity, making these policies relatively successful. As a result, China rapidly recovered and became the economy least affected by the depression,

8 Burak Gürel, "Çin'in Yükselişinin Tarihsel Arka Planı ve Yakın Geleceği," in *Çin Bilmecesi: Çin'in Ekonomik Yükselişi, Uluslararası İlişkilerde Dönüşüm ve Türkiye*, edited by Mustafa Yağcı and Caner Bakır, İstanbul: Koç Üniversitesi Yayınları, 2019, pp. 38-39.

9 Ibid., p. 37.

10 Christine Wong, "The Fiscal Stimulus Programme and Public Governance Issues in China," *OECD Journal on Budgeting*, vol: 11, no: 3, 2011, p. 2.

and its dynamism helped the global economy to avoid a total collapse.<sup>11</sup>

Indeed, the Hu-Wen administration created a false spring and showcased a positive economic performance through stimulus and rescue packages. Moreover, the material concessions mentioned earlier allowed it to gain a certain level of sympathy from workers and peasants, albeit short of a strong hegemony. However, despite the appearance of economic recovery, fundamental problems remained unsolved. The presence of numerous zombie companies that remained afloat with state support and the enormous cost incurred by the banking sector indicated that the so-called recovery was more of a postponement of the crisis rather than a genuine and lasting revival. Hence, as Xi took over in 2012, the Hu-Wen duo left him with an economic crisis ticking bomb waiting to explode. The postponement of the crisis might have provided temporary relief, but it also raised concerns about the sustainability of such policies and their potential long-term consequences. Addressing the structural economic problems, dealing with unprofitable and non-performing businesses, and managing the risks associated with non-repayable loans were significant challenges the new administration, led by Xi Jinping and Li Keqiang, faced.

### ***Growing contradictions between the semi-peripheral China and imperialism***

The increasing economic and geopolitical competition between China and imperialist states was another major problem Xi inherited from the Hu-Wen duo. The PRC has been one of the few countries that could improve its position in the world economic hierarchy and move up the ladder in the entire age of imperialism, which started in the late 19th century and is still ongoing. In 1960, China's per capita income was almost the same as India's and less than one-fifth of Turkey's. In 2021, China's per capita income was more than five times that of India and 30% above Turkey's.<sup>12</sup> In other words, China made a great leap from the periphery to the semi-periphery of the world system. However, there is a difficult gap to close between China and the imperialist economies. China's current per capita income is less than one-fifth of that of the United States, one-fourth of that of Britain, and one-third of that of Japan.<sup>13</sup>

Even if the gap between China and imperialism never closes, if China, a giant country with a population of 1.4 billion, continues rising in the decades to come, the economic dominance of the West may vanish. From the point of view of Western imperialism, the joining of Taiwan and South Korea, which are small in population and territory and have been under the military-political umbrella of the USA since the 1950s, to the imperialist club was a welcome development that could be managed without disrupting the inter-imperialist balance significantly. However, from the

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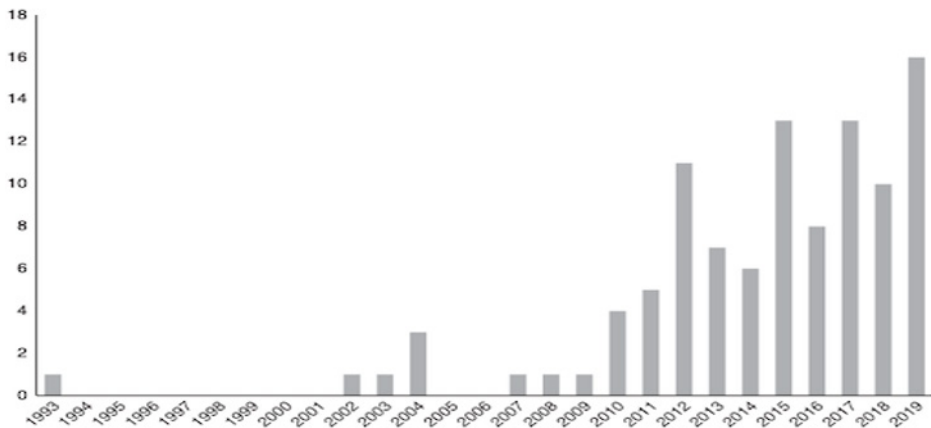
11 Sungur Savran, *Üçüncü Büyük Depresyon: Kapitalizmin Alacakaranlığı*, İstanbul: Yordam Kitap, 2022 (2<sup>nd</sup> edition), pp. 35, 108-109.

12 <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=ZG-CN-IN-TR> (accessed October 10, 2022).

13 <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?end=2021&locations=CN-GB-US-JP&start=2021>

(accessed October 10, 2022).

same perspective, repeating the same success by a giant and autonomous power like China looks like an unwelcome development that must be prevented at any cost. The systematic efforts of the Chinese state to close the scientific and technological gap between China and the West frighten the imperialist camp. Overjoyed to exploit China's cheap and semi-skilled workforce, American companies lobbied for good relations with China in the 1990s and early 2000s. However, as the competitiveness of Chinese companies started to increase dramatically thanks to government support, many large American companies changed their stance and started to demand hawkish policies against China.<sup>14</sup>



**Figure 3. Count of US corporate lawsuits against Chinese entities on intellectual property issues in US Courts, 1993–2019<sup>15</sup>**

After the onset of the third great depression, the economic competition among imperialist powers and between them and China intensified. The geopolitical implications of this competition began to manifest during the Hu-Wen era. Tensions escalated between China and the West on various issues, such as Taiwanese independence, territorial disputes in the South China Sea, the status of Hong Kong, and the national questions concerning Uyghurs and Tibetans.

When Xi Jinping took over, these issues were already at the forefront of his agenda. He inherited a complex and challenging geopolitical landscape, with tensions and competition between China and Western powers reaching new heights. Xi's leadership capacity would be critical in navigating these delicate issues and determining China's stance in the face of international pressures.

The disputes over territorial claims, human rights issues, and regional power struggles would continue to shape China's relations with other countries and

<sup>14</sup> Ho-fung Hung, *Clash of Empires: From "Chimerica" to the "New Cold War"*, Cambridge: Cambridge University Press, 2022, pp. 8-47.

<sup>15</sup> Ibid., p. 37.

influence the dynamics of global politics during the Xi era. As the leader of China, he was responsible for handling these issues while maintaining economic growth and political stability.

### ***Divisions within the Chinese bourgeoisie***

The factors mentioned above have created significant divisions within the Chinese capital. During the post-1978 “reform and opening up” era, mainland/indigenous capitalists accumulated significant fortunes thanks to vast reserves of low-cost and semi-skilled labor and access to cheap land (almost free in industrial zones like the Pearl River Delta) based on the local governments’ firm control over land. The strong global demand for cheap Chinese goods, especially from Western countries, supported this capital accumulation. While the Chinese government occasionally emphasized the importance of indigenous innovation, local companies were not yet competitive in high-tech production on the global stage, particularly against Western, Japanese, and South Korean firms. Instead, in the 1980s and 1990s, China followed the “Technology Trade Market” strategy based on importing Western technology. While indigenous technology projects of the Mao era (such as the Shanghai Y-10 aircraft) were canceled, foreign technology companies’ entry into the Chinese market and foreign-local partnerships were encouraged. This strategy aimed to enhance local companies’ technological capabilities but failed to achieve this goal. Foreign companies used local partners to manufacture their products in China quickly and inexpensively without transferring significant research and development (R&D) capacity to their Chinese partners. The lion’s share of profits from production chains went to foreign companies, leaving only crumbs for local firms.<sup>16</sup>

This harmonious yet unequal partnership between Chinese and imperialist capital began to break down in the 2000s. Rising labor costs due to successful labor movements in China, coupled with the subordinate position of local companies in production chains, squeezed local firms with already low profit margins. As a result, China’s capital accumulation strategy based on low wages and cheap exports reached its limits. To solve this deadlock, a new fraction of Chinese capital emerged, aiming to improve its position in global value chains by enhancing research and development (R&D) capabilities, thereby increasing its share of the profit pie (at the expense of imperialist capital). At the same time, due to the reluctance of foreign capital to share technology with their local partners, the Chinese government shifted away from its “Technology Trade Market” strategy and began prioritizing self-sufficiency. The intensifying global competition among different countries’ capitalists after the 2008 crisis further accelerated this trend.<sup>17</sup>

As the experiences of a few countries that have risen from the periphery to the center of the world system have shown, developing high technology and becoming competitive is costly and risky. It requires patience and long-term planning; hence, it is not a goal the private sector can achieve without significant state support. As

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<sup>16</sup> Nogueira and Qi, pp. 567-571.

<sup>17</sup> Ibid., pp. 570-571.

I noted above, the Chinese state has maintained significant intervention capacity by excluding key sectors from privatization. During Hu Jintao's tenure, the state promoted domestic technology production through public-private partnerships. The "Indigenous Innovation" program launched in 2006 was a critical milestone. Mega-projects involving several ministries provided significant economic, scientific, and technological support to both state-owned enterprises (SOEs) and selected private companies like Lenovo and Huawei.<sup>18</sup> When looking at indicators such as the share of R&D activities and newly developed products in total production, patent registrations, and technology awards given by the government, SOEs have outperformed the private sector. Another factor compelling the SOEs to emphasize technology and innovation is that they pay their employees higher wages than the private sector.<sup>19</sup>

From the mid-2000s, the Chinese state began to set technical standards for telecommunication projects that favor domestic companies and exclude foreign ones. Collaboration between selected private companies and party and state organs intensified regarding finance, personnel, politics, etc. ZTE, a telecommunication company partially owned by the state but operated by private sector partners, became one of the most prominent companies during this period.<sup>20</sup> The Hu-Wen administration aimed to involve large private companies in programs such as the "Harmonious Society" and "Common Prosperity" to strengthen the political hegemony of the state. As a result of these policies, the composition of Chinese capital began to change, giving rise to a new bourgeois fraction that prioritizes innovation.<sup>21</sup>

However, the transformation of Chinese capital did not stop there. As the accumulation strategy based on low technology and cheap labor became increasingly ineffective, a part of the capitalist class turned to financial speculation. Although the government's stimulus packages after 2008 provided temporary relief, they also significantly increased the debt of local governments and SOEs, which led to the emergence of a large shadow banking sector. Furthermore, as the temporary economic recovery waned, profit margins in productive sectors declined, encouraging financial speculation. Private commercial banks, financial institutions, and real estate companies channeled substantial money into speculation by establishing nebulous partnerships. Introducing new financial products -like asset and wealth management products- made collecting large sums of money from the public possible, further fueling speculative tendencies.

Scandals that erupted during the Hu-Wen and Xi eras revealed that the financial speculator wing of the Chinese capital, in collaboration with the bureaucracy, established shell companies, concealed share structures, and manipulated state banks to defraud small investors looking to invest in the stock market. China

<sup>18</sup> Ibid., pp. 571-572.

<sup>19</sup> Hao Qi and David M. Kotz, "The Impact of State-Owned Enterprises on China's Economic Growth," *Review of Radical Political Economics*, vol. 52, no. 1, 2020, pp. 96-114.

<sup>20</sup> Nogueira and Qi, p. 572; "ZTE (中兴通讯)," <https://thechinaproject.com/company-profiles/zte/> (accessed November 26, 2022).

<sup>21</sup> Nogueira and Qi, p. 571.

Minsheng Investment Group (CMIG), known as “China’s J.P. Morgan,” is a striking example of this tendency. A small group of individuals at the core of CMIG led their close associates to establish shell companies that bought CMIG shares. CMIG often awarded generous contracts and tenders to these shell companies through mechanisms that often did not comply with legal requirements. Taking advantage of their association with CMIG and the contracts they received, these shell companies borrowed significant amounts of money from state banks. CMIG also benefited from government credits and grants intended to promote industrial innovation through its hidden partners within the bureaucracy.<sup>22</sup>

Another notable case, Tomorrow Group, inflated its balance sheet and used the money it collected from banks and the stock market to purchase Ronglian, a company with a net asset value of only 14.8 million yuan, for a staggering 810 million yuan (54 times its net asset value!). It later appeared that Ronglian was a shell company that Tomorrow Group’s executives established. It was also discovered that the Baoshang Bank, part of the same group, lent 15 billion yuan to over 200 shell companies. Furthermore, Anbang Insurance Group, one of China’s largest insurance companies, established a massive pyramid scheme by collecting money from the stock market, investing it in hundreds of affiliated shell companies, and borrowing from the same companies. The illegal speculative activities of financial capital and the bureaucrats-turned-capitalists have threatened economic and political stability.<sup>23</sup>

In brief, before Xi took office, Chinese capital was already divided into three sectoral fractions: low-tech productive capital, high-tech productive capital, and financial speculators.<sup>24</sup> On the other hand, the degree of proximity in state-capital relations formed another axis of division parallel to this sectoral division but not entirely reducible to it. At the top of the hierarchy was a narrow bourgeois-bureaucrat group with significant influence over the SOEs and major private companies. In the middle tier lies another bourgeois-bureaucrat clique consisting of SOE managers and provincial party secretaries closely linked to major private companies. Private companies with limited ties to the state bureaucracy were at the lowest rung. It is worth mentioning that there are small bourgeoisie circles organized around the remnants of the bourgeois parties that cooperated with the CCP in the 1940s, such as the “United Front Democratic Parties” and “Patriotic Overseas Chinese Representatives.” Since their position has largely remained symbolic since 1949, they do not significantly influence the party-state today. Additionally, influential figures such as top lawyers, media executives, academics, and leading figures of the cultural industry have intricate connections with various layers of the capitalist hierarchy.<sup>25</sup> These groups often organize themselves in clubs and associations outside the party and state hierarchy, attempting to exert influence over economic and political affairs. One notable example is the Taishan Industrial Research Institute (known as the “Taishan Club”), with roots dating back to the 1980s and

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22 Meg Rithmire and Hao Chen, “The Emergence of Mafia-Like Business Systems in China,” *The China Quarterly*, vol. 248, no. 1, 2021, pp. 1045-1046.

23 Ibid., pp. 1047-1055.

24 Nogueira and Qi, pp. 571-574.

25 “A State Adequate to the Task: Conversations with Lao Xie,” *Chuang*, no. 2, 2019, pp. 324-326.

officially established in 1994, which plays a role in bringing together ultra-wealthy individuals.<sup>26</sup> Xi Jinping perceives these divisions, especially independent initiatives like the Taishan Club, as factors threatening political stability in China.

## Corruption

The problem of corruption deepened in parallel with the political-economic context explained above. Corruption has long been one of the critical mechanisms enabling the metamorphosis of the party bureaucracy into a bourgeoisie. After the start of the “dual-price system” in 1984, bureaucrats at the Material Supply Bureau amassed great wealth by selling cheap, “in-plan” industrial materials to their bourgeois networks.<sup>27</sup> During the wave of privatizations in the late 1990s and early 2000s, many bureaucrats became shareholders and managers of privatized companies, looting approximately 5 trillion US dollars in wealth. Large bribes from private companies to the bureaucrats to secure government contracts and evade taxes have also contributed to the bourgeois transformation of the Chinese bureaucracy.

Another mechanism runs through family networks. Local and foreign private companies doing business and eager to maintain good relations with the government employ the family members and relatives of the bureaucrats and pay them generously. As we saw above, organic connections between financial speculators and the bureaucracy have also been formed. According to a 2006 study, out of 3,200 Chinese citizens with a wealth exceeding 15 million dollars, approximately 2,900 were family members and relatives of bureaucrats.<sup>28</sup> These developments have made corruption a structural problem in the country since the 1980s. The public has been dismayed by corrupt officials. However, as long as the economy developed rapidly and average incomes increased, these reactions did not reach a level that could threaten the regime.<sup>29</sup>

After the 2008 crisis, this situation started to change. With the economic pie not growing as fast as before, corruption became more apparent to the public.<sup>30</sup> Additionally, as different factions within the capital and the party struggled against each other, they also used corruption files as a weapon, posing a threat to political stability. The events leading up to the 18<sup>th</sup> Party Congress when Xi Jinping came to power highlighted this issue. One of Xi’s main rivals, Bo Xilai, the party secretary of Chongqing, was arrested on corruption charges before the congress, and his wife, Gu Kailai, was charged with the murder of a British businessman with whom the Bo family cooperated in shady business matters. The media reported that Bo’s

26 Ibid., p. 290; William Zheng, “Taishan Club For Country’s Leading Tycoons Disbands,” *South China Morning Post*, February 14, 2021; Yuan Guobao, “Taishan Club: The Rise and Fall of Secretive Roundtable of China’s Richest,” October 6, 2021, <https://www.thinkchina.sg/taishan-club-rise-and-fall-secretive-roundtable-chinas-richest> (accessed November 9, 2022).

27 Nogueira and Qi, p. 565.

28 Minqi Li, *China and the Twenty-First Century Crisis*, London: Pluto Press, 2016, pp. 19-23, 32-34.

29 Deng Yuwen, “Who Are Xi’s Enemies?,” October 15, 2022, <https://foreignpolicy.com/2022/10/15/xi-congress-enemies-communist-china/> (accessed October 23, 2022).

30 Ibid.

family fortune was at least 136 million USD.<sup>31</sup> However, two other news reports published during the same period showed that those involved in Bo's downfall were not much different from him. According to a *New York Times* report, Premier Wen Jiabao's family had a fortune of at least 2.7 billion USD.<sup>32</sup> According to a *Bloomberg News* report, Xi Jinping's family and relatives had a rich portfolio, including investments of a total of 376 million USD in different companies, an 18% stake in a mining company with a total worth of 1.73 billion USD, and 20 million dollars in bonds from a technology company.<sup>33</sup> Thus, Xi Jinping had to address the issue of corruption closely to avoid the weakening of party-state hegemony and weaken his rivals within the bureaucracy, primarily those closely linked to financial speculators, while protecting his inner circle.

### ***Aggravating national questions***

As Hu Jintao handed over his seat to Xi Jinping, he left behind a growing tangle of national issues, especially concerning the Uyghurs and Tibetans. The CCP challenged Han chauvinism in the 1930s by promising the Uyghurs, Tibetans, and other oppressed nationalities the right to self-determination. After coming to power, the PRC implemented specific positive discrimination measures and granted symbolic autonomy to these oppressed nationalities. Still, it never recognized their right to self-determination.<sup>34</sup> Language and religious freedom for these groups were frequently violated. Since the Mao era, a settler-colonial policy based on transferring the Han population to Xinjiang and Tibet was enforced. Xinjiang Uyghur Autonomous Region, which holds 22% of China's oil and 28% of its natural gas reserves,<sup>35</sup> experienced the most profound impact of this settler-colonialism. Through the military-cum-economic organization called Xinjiang Production and Construction Corps, established in 1954, the policy of Han population transfer has been systematically implemented to this day. As a result, the demographic structure of Xinjiang underwent a dramatic change. The Uyghurs' proportion of the regional population declined from 82.7% in 1945 to 45.7% in 1982 and 44.8% in 2020. In contrast, the Han population, which was only 6.2% in 1945, increased to 40.3% in 1982 and reached 42% in 2020.<sup>36</sup>

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31 Susan Berfield, "The Business Ties of Bo Xilai," April 27, 2012, <https://www.bloomberg.com/news/articles/2012-04-26/the-business-ties-of-bo-xilai> (accessed October 27, 2012).

32 David Barboza, "Billions in Hidden Riches for Family of Chinese Leader," October 25, 2012, <https://www.nytimes.com/2012/10/26/business/global/family-of-wen-jiabao-holds-a-hidden-fortune-in-china.html> (accessed October 27, 2012).

33 "Xi Jinping Millionaire Relations Reveal Elite Chinese Fortunes," June 29, 2012, <https://www.bloomberg.com/news/articles/2012-06-29/xi-jinping-millionaire-relations-reveal-fortunes-of-elite?sref=1FkogH50> (accessed October 27, 2012).

34 Burak Gürel, "Stalinizm ile Kapitalizm Arasında Köprü Kuran Bir Düşünür: Domenico Losurdo," *Devrimci Marksizm*, no: 45/46, 2021, pp. 231-232.

35 Ji Yeon Hong and Wenhui Yang, "Oilfields, Mosques and Violence: Is There a Resource Curse in Xinjiang?," *British Journal of Political Science*, vol: 50, no: 1, 2020, p. 54.

36 Anthony Howell and C. Cindy Fan, "Migration and Inequality in Xinjiang: A Survey of Han and Uyghur Migrants in Urumqi," *Eurasian Geography and Economics*, vol: 52, no: 1, 2011, p. 123; "Xinjiang's Han Chinese Growing Faster than Uyghurs," June 15, 2021, <https://www.asianews.it/news-en/Xinjiang%E2%80%99s-Han-Chinese-growing-faster-than-Uyghurs-53420.html> (ac-

After the “Great Western Development Strategy” was launched in 2000, mining and infrastructure investments in the region surged while the economic disparity between the Uyghurs and Han populations widened. The state suppressed mass demonstrations carried out by the Uyghurs against language and religious freedom violations and Han population transfer, such as the student protests from December 1985 to 1988.<sup>37</sup> The Han-Uyghur clashes in Urumqi in July 2009, resulting in the deaths of 197 people and injuries to over 1,700 people, marked the breaking point of accumulated tension.<sup>38</sup>



**The bomb attack organized by Uyghur Islamists in Tiananmen Square (October 28, 2013)**

Over time, despite a significant portion of the Uyghur population having secular tendencies, the Uyghur national movement shifted towards religious and conservative channels due to the association of communism with Han chauvinism and the suppression of religious practices. Various Islamist groups, ranging from Al-Qaeda to ISIS, gained supporters among the Uyghurs. These groups’ most notable actions occurred during the first two years of Xi Jinping’s tenure.

On April 24, 2013, 21 people were killed in clashes between armed Uyghurs and the police in Maralbeshi county of Kashgar.<sup>39</sup> On October 28, 2013, the East Turkistan Islamic Movement (also known as the “Turkistan Islamic Party”) carried out a bombing attack in Tiananmen Square, located close to the central organs of the party-state, resulting in the deaths of 5 people and injuring 38 others.<sup>40</sup> On March

cessed October 31, 2022).

37 Brian Spivey, “The December 12th Student Movement: Uyghur Student Protest in Reform-Era China,” *The Journal of Asian Studies*, 2022, pp. 1-20, doi:10.1017/S0021911822001206.

38 “Xinjiang Arrests ‘Now Over 1,500’,” August 3, 2009, <http://news.bbc.co.uk/2/hi/asia-pacific/8181563.stm> (accessed October 31, 2022).

39 “China Jails 11 in Xinjiang for Religious Hatred,” June 20, 2013, <https://www.bbc.com/news/world-asia-china-22982398> (accessed October 31, 2022).

40 “China to Try Eight People Over Deadly Tiananmen Attack,” May 31, 2014, <https://www.bbc.com/news/world-asia-china-27647842> (accessed October 31, 2022).

1, 2014, a knife attack at a train station in Kunming resulted in 31 people being killed and over 140 others injured.<sup>41</sup> On July 28, 2014, clashes in Yarkand County, Kashgar and involving a combination of mass protests and armed strikes, led to the deaths of nearly 100 people according to official figures, but independent sources suggest the death toll could be in the hundreds.<sup>42</sup>

## Xi's ten-year record

### *Anti-labor policies*

Xi's ten-year record has been marked by attempts to find solutions to the challenges discussed above. To mitigate the Third Great Depression's adverse effects on Chinese capitalism, more specifically, to restore the profitability of Chinese capital, the government has carried out an enormous assault against the working class from 2015 on. Labor NGOs and solidarity networks suffered from more repressive measures than in previous administrations.<sup>43</sup> One critical turning point during this period was the eruption of a strike in a factory owned by Jasic Technology in Huizhou city in Guangdong province in 2018. Leftist students, including many Maoists, from various universities, notably Peking University, who actively supported this strike were arrested.<sup>44</sup> As a result of the government crackdown, the labor movement began to decline.<sup>45</sup>

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41 "Four Sentenced in China Over Kunming Station Attack," September 12, 2014, <https://www.bbc.com/news/world-asia-china-29170238> (accessed October 31, 2022).

42 "China Now Says Almost 100 Were Killed in Xinjiang Violence," August 4, 2014, <https://time.com/3078381/china-xinjiang-violence-shache-yarkand/> (accessed October 31, 2022).

43 Yaxue Cao, "Chinese Authorities Orchestrate Surprise Raid of Labor NGOs in Guangdong, Arresting Leaders," December 10, 2015, <https://chinachange.org/2015/12/10/chinese-authorities-orchestrate-surprise-raid-of-labor-ngos-in-guangdong-arresting-leaders/> (accessed October 31, 2022); Keegan Elmer, "Five Activists Held in Crackdown," *South China Morning Post*, January 23, 2019; Jude Howell, "From Green Shoots to Crushed Petals: Labour NGOs in China," *Made in China Journal*, vol. 6, no: 1, 2021, pp. 102-107.

44 Mimi Lau, "Hard-core Maoists Fight with Students for Workers' Rights," *South China Morning Post*, August 11, 2018; Shen Mo, "China: Arrests of Maoist Youth Triggers Online Protests," February 10, 2018, <https://chinaworker.info/en/2018/02/10/16980/> (accessed November 9, 2022); Christian Shepherd and Ben Blanchard, "Leading Chinese Marxist Student Taken Away by Police on Mao's Birthday," December 26, 2018, <https://www.reuters.com/article/us-china-politics-mao-idUSKCN1OP0EK> (accessed November 9, 2022). Other Maoist groups also suffered from state repression ("Chinese Police Detain Maoist Leftists Ahead of Ruling Party Centenary," June 9, 2021, <https://www.rfa.org/english/news/china/maoists-detentions-06092021114100.html> (accessed November 9, 2022); Guo Rui and William Zheng, "Mao Fanatics Get Prison Terms for Tainting Leaders," *South China Morning Post*, January 12, 2022.

45 This interview with Chinese Marxist economist Ying Chen provides a clear framework for the rise and fall of the labor movement: [https://www.youtube.com/watch?v=xdeSCw5a5\\_U](https://www.youtube.com/watch?v=xdeSCw5a5_U) (accessed November 9, 2022).



### **Students who were arrested because of their solidarity with the labor strike at Jasic Technology (2018)**

During the Hu-Wen era, Chinese workers gained substantial material concessions, including wage raises and expanding social security coverage. However, shortly after Xi took office, some officials claimed that the previous administration made unrealistic promises about social security and brought up the issue of raising the retirement age.<sup>46</sup> In China, the retirement age in the public sector is 60 for men, 55 for white-collar women, and 50 for blue-collar women. This rule has remained unchanged since the Mao era. The 12<sup>th</sup> Five-Year Plan (2011-2015), prepared during the Hu-Wen era, suggested flexibility in the retirement age. However, the 14<sup>th</sup> Five-Year Plan (2021-2025), bearing Xi's signature, reveals the government's intention to raise the retirement age gradually. The working class is known to be opposed to this plan. So far, the Xi administration has not taken concrete steps toward this goal.<sup>47</sup>

Despite Xi's rhetoric of "common prosperity" and the "Chinese dream," social inequalities have not decreased. The Gini coefficient, which measures the combination of class and regional disparities, reached a considerably high level of 0.47 in 2012. During Xi's tenure, this coefficient did not decrease and was still calculated as 0.47 in 2020.<sup>48</sup> Moreover, the share of personal wealth of Chinese billionaires in the total national income increased from 7% in 2019 to 15% in 2021.<sup>49</sup>

46 "A State Adequate to the Task," pp. 332-33.

47 Iori Kawate, "China's Young and Old Rail Against Raising Retirement Age," August 4, 2021, <https://asia.nikkei.com/Spotlight/Society/China-s-young-and-old-rail-against-raising-retirement-age> (accessed November 9, 2022); "How Should China Raise Retirement Age?," March 16, 2021, [https://global.chinadaily.com.cn/a/202103/16/WS604fe77ea31024ad0baaf54c\\_2.html](https://global.chinadaily.com.cn/a/202103/16/WS604fe77ea31024ad0baaf54c_2.html) (accessed November 9, 2022).

48 Tom Hancock, "China Needs Cut to Inequality for Common Prosperity: PBOC's Cai," November 29, 2021, <https://www.bloomberg.com/news/articles/2021-11-29/china-needs-cut-to-inequality-for-common-prosperity-pboc-s-cai> (accessed April 7, 2022).

49 Michael Roberts, "China: Xi's Third Term – Part Two: Property, Debt and Common Prosperity," October 18, 2022, <https://thenextrecession.wordpress.com/2022/10/18/china-xis-third-term-part-two-property-debt-and-common-prosperity/> (accessed October 18, 2022).

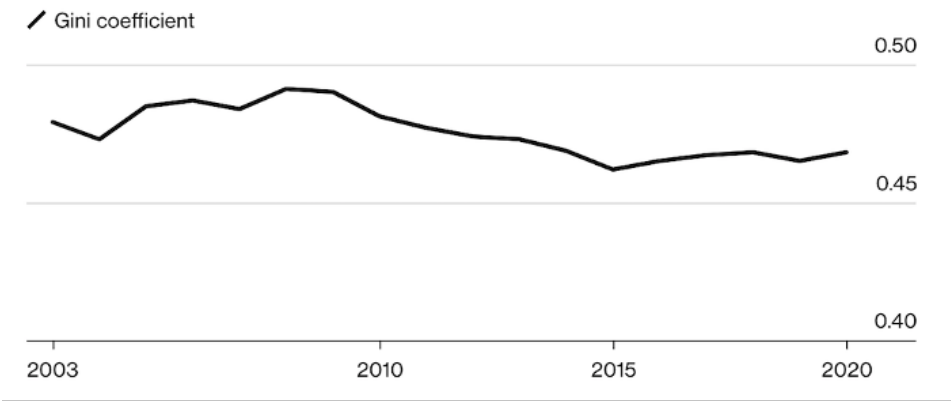


Figure 4. Gini coefficient in China (2003-2020)<sup>50</sup>

*Gendered policies*

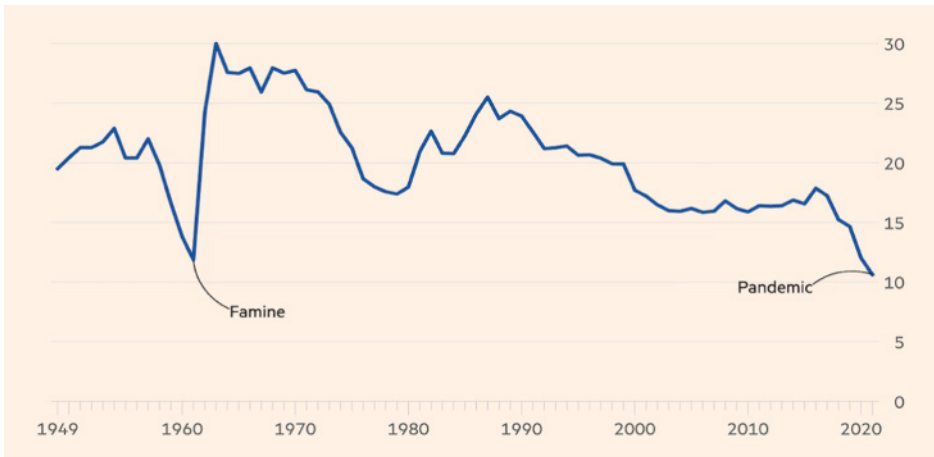
The Xi administration ended the one-child policy, which had existed since 1979. The right to have two children was granted to married couples in 2016, and the right to have three children was given in 2021.<sup>51</sup> Women’s high participation level in education and the workforce has been one of the most significant historical achievements of the Chinese Revolution. Despite the problems it created, the one-child policy also strengthened women’s gains. Giving couples the freedom to choose the number of children they want is not the main issue. The Xi administration implemented this change as part of a male-dominated campaign imposing the motherhood role on women.<sup>52</sup> So far, this campaign has not yielded visible results, as the fertility rate has not increased. If the current trend continues, China’s population, currently at 1.4 billion, is expected to fall below 800 million by 2100.<sup>53</sup>

50 Hancock, “China Needs”.

51 “China Allows Three Children in Major Policy Shift,” May 31, 2021, <https://www.bbc.com/news/world-asia-china-57303592> (accessed November 1, 2022).

52 Zixu Wang, Xin Chen, and Caroline Radnofsky, “China Proposes Teaching Masculinity to Boys as State is Alarmed by Changing Gender Roles,” March 5, 2021, <https://www.nbcnews.com/news/world/china-proposes-teaching-masculinity-boys-state-alarmed-changing-gender-roles-n1258939> (accessed October 5, 2022); Zhuoran Li and Jennifer Lee, “Chinese Feminists Caught Between a Rock and the Party,” July 15, 2022, <https://thediplomat.com/2022/07/chinese-feminists-caught-between-a-rock-and-the-party/> (October 5, 2022).

53 Eleanor Olcott, “China’s Demographic Crisis Looms Over Xi Jinping’s Third Term,” October 3, 2022, <https://on.ft.com/3RtPgI6> (accessed November 1, 2022).



**Figure 5. Number of births in China, 1949-2021 (Million)<sup>54</sup>**

The Chinese government put heavy pressure on women and the LGBTQ+ movements, which Xi perceived as obstacles to his gendered policies. On March 6, 2015, five feminists preparing to distribute leaflets against sexual harassment of women on public transportation in Beijing on International Women's Day (March 8) were arrested and detained for a staggering 37 days.<sup>55</sup> Other actions addressing the issue of sexual harassment were persistently obstructed.

The case of renowned female tennis player Peng Shuai added to the concerns about Xi's approach. On November 2, 2021, Peng Shuai posted a message on the social media platform Weibo, revealing that Zhang Gaoli (a former CCP Politburo Standing Committee member and former Deputy Prime Minister from 2013 to 2018) sexually assaulted her. However, internet censors quickly removed the message, and media coverage of the incident was not allowed. Peng disappeared from the public eye for nearly two weeks, most likely facing threats and intimidation, and was unable to bring up the matter again publicly.<sup>56</sup>

In summary, Xi pursued policies hostile not only towards the working class but also towards women. His actions demonstrated an apparent disregard for women's rights and freedom of expression, and the suppression of gender-related issues under his leadership was evident.

### ***The quest for a repressive "solution" to national questions***

Xi tried to address the aggravating national questions by employing state violence

<sup>54</sup> Ibid.

<sup>55</sup> Wang Zheng, "Detention of the Feminist Five in China," *Feminist Studies*, vol: 41, no: 2, 2015, pp. 476-482.

<sup>56</sup> Kai Wang and Wanyuan Song, "Peng Shuai: How China Censored a Tennis Star," February 1, 2022, <https://www.bbc.com/news/59338205> (accessed November 9, 2022).

to an unprecedented level. In Xinjiang, thousands of Uyghurs were detained in the so-called “vocational education centers” (“re-education camps”) between 2014 and 2019. Enforced disappearances, travel restrictions, and digital surveillance became a part of daily life.<sup>57</sup> The number of staff of the Xinjiang Production and Construction Corps, responsible for Han population transfer, reached 3.25 million in 2019. Approximately one-third of the 1.25 million increase in Xinjiang’s population between 2016 and 2019 can be attributed to this organization’s personnel growth.<sup>58</sup> Prominent Uyghur intellectual Ilham Tohti was sentenced to life imprisonment on charges of separatism in 2014.<sup>59</sup> The deepening of Han chauvinism and settler-colonialism poisoned Han-Uyghur relations while expanding the influence of religious-extremist movements on the Uyghur community.

Hong Kong also witnessed significant repression under Xi’s leadership. After Britain handed over Hong Kong to the PRC in 1997, it operated under the “one country, two systems” framework as a “Special Administrative Region.” Hong Kong’s capitalist class maintained a close relationship with Western capital and states, especially the US and the UK. Additionally, due to the continuation of free elections, organizing rights, and the right to assembly and protest, Hong Kong continued to be a region where dissent against the Chinese regime (from left to right) could be organized. The Chinese state started undermining Hong Kong’s autonomy by supporting the formation of a pro-mainland capitalist faction and gradually curtailing existing freedoms. Xi took the most decisive and firm step in this direction. In 2014, the Chinese state required approval from the Chinese government for candidates participating in Hong Kong elections. In response, the “Umbrella Movement” carried out mass protests on Hong Kong streets for three months, with more than one million participants on the 7.5 million-populated island.<sup>60</sup> The Chinese state did not yield to the protests, thereby eliminating the most fundamental democratic right in Hong Kong. Subsequently, the repression against CCP critics intensified.

The second move to eliminate Hong Kong’s autonomy occurred in 2019 when a proposed law allowed the Hong Kong government to extradite individuals to mainland China. In response, protests with over two million participants were held in 2019 and 2020, resulting in violent clashes between police and demonstrators.<sup>61</sup>

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57 Some sources suggest that around 1 million Uyghurs (that is, about 10% of the Uyghur population in the region) were held in the camps (Darren Byler, “Ghost World,” May 1, 2019, <https://logicmag.io/china/ghost-world/> (accessed January 12, 2021). The report of the United Nations High Commissioner for Human Rights on the subject stated that many people were kept in camps but did not provide an exact number (United Nations Human Rights Office of the High Commissioner, “OHCHR Assessment of Human Rights Concerns in the Xinjiang Uyghur Autonomous Region, People’s Republic of China,” August 31, 2022, p. 18, <https://www.ohchr.org/sites/default/files/documents/countries/2022-08-31/22-08-31-final-assesment.pdf> (accessed November 26, 2022)).

58 Sidney Leng and Cissy Zhou, “Region’s Population Jumps 18pc from Decade Ago,” *South China Morning Post*, May 13, 2021.

59 “China Jails Prominent Uighur Academic Ilham Tohti for Life,” September 23, 2014, <https://www.bbc.com/news/world-asia-29321701> (accessed April 7, 2022).

60 “Hong Kong Çin Toprağıdır!,” June 28, 2022, <https://gercekgazetesi1.net/uluslararasi/hong-kong-cin-topragidir> (accessed November 9, 2022).

61 “Hong Kong: Tek Ülke, Tek Sistem, İki Rejim,” August 27, 2019, <https://gercekgazetesi1.net/>

In September 2019, the Hong Kong administration agreed to amend parts of the law.<sup>62</sup> Shortly after, in November, Xi, disturbed by the success of pro-autonomy candidates in the local elections and taking advantage of the COVID-19 pandemic-related lockdowns, launched a final assault. In May 2020, the National Security Law was enacted, effectively ending the region's autonomy. The Hong Kong Confederation of Trade Unions dissolved under intense state pressure on October 3, 2021. Censorship was imposed on the press, numerous pro-autonomy politicians and activists were arrested, and tens of thousands fled Hong Kong.<sup>63</sup>



**Mass protests in Hong Kong (2019)**

Other parts of Chinese society also suffered from increasing repression under Xi's rule. For instance, on July 9, 2015, more than 300 human rights lawyers were detained; some later released were put under house arrest.<sup>64</sup> Academic freedoms, which were already fragile, were further restricted. Publications by academics faced strict scrutiny, and the strengthened surveillance system monitored the views expressed by students during classes, leading to punishment for those expressing dissenting opinions.<sup>65</sup>

uluslararası/hong-kong-tek-ulke-tek-sistem-iki-rejim (accessed November 9, 2022).

62 "The Evolution of the Hong Kong Protests," November 22, 2021, <https://edition.cnn.com/videos/world/2019/11/22/hong-kong-china-protests-timeline-lon-orig-bks.cnn> (accessed November 9, 2022).

63 Austin Ramzy, "As Hong Kong's Civil Society Buckles, One Group Tries to Hold On," October 24, 2021, <https://www.nytimes.com/2021/10/24/world/asia/hong-kong-civil-society.html> (accessed November 9, 2022); Vivian Wang, "'This Drop Came So Quickly': Shrinking Schools Add to Hong Kong Exodus," October 11, 2021, <https://www.nytimes.com/2021/10/11/world/asia/hong-kong-population-drop.html> (accessed November 9, 2022).

64 Stella Chen, "Lawyer Jailed in '709' Crackdown Freed," *South China Morning Post*, September 27, 2022.

65 "Orwell in the Chinese Classroom," May 27, 2019, <https://madeinchinajournal.com/2019/05/27/orwell-in-the-chinese-classroom/> (accessed October 7, 2022).

To complete our analysis, we can compare the domestic security budget with the national defense budget. The domestic security budget surpassed the national defense budget for the first time in 2010 (during the second half of the Hu-Wen era). The ratio of the domestic security budget to the national defense budget was 105.1% in 2013 (the first year of Xi's tenure) and increased to 113% in 2016.<sup>66</sup> In other words, even during an increased military encirclement led by the US, the Chinese state allocates more resources to internal security than the military. In other words, the Chinese state views labor, women, and national movements as primary threats.

### ***Widespread purges within the bourgeoisie, party, and the state***

While crushing the proletariat's most class-conscious and combative sections, Xi also tries to convey a clean and honest public image. To establish a class-neutral position in the eyes of society, he launched extensive anti-corruption campaigns within the party and state. Some major companies were penalized, with some bosses imprisoned. These measures aim to avoid the party-state's hegemonic decline, discipline the bureaucracy and bourgeoisie, and tie them closer to the party. We must recall that Xi started by cleaning up his own house before holding others accountable. It was no secret that his family, like other high-ranking bureaucrats, became wealthy due to capitalist restoration. Hence, as a starter, he had them withdraw from business activities, selling their company shares and dissolving their partnerships.<sup>67</sup>

Strikingly enough, during the past decade, around 100,000 lower and mid-level and a few hundred top-level officials were arrested under corruption investigations. Many of these operations targeted Xi's rivals within the party. In 2016, Xi claimed that certain people were organizing "political plot activities" to divide and destroy the party. In 2017, Vice President Wang Qishan claimed that some senior officials were trying to "seize party and state power."<sup>68</sup> The anti-corruption campaign played a significant role in Xi's internal power struggles. The first target was the Bo Xilai clique, which put obstacles to Xi Jinping's ascent to power on the eve of the 18<sup>th</sup> Party Congress in November 2012. As mentioned above, Bo was arrested on corruption charges and his wife's involvement in a murder case.<sup>69</sup> Another prominent figure, Zhou Yongkang, a member of the Politburo Standing Committee between 2002-2007 and the Minister of Public Security, was investigated for corruption and

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66 Adrian Zenz, "China's Domestic Security Spending: An Analysis of Available Data," *China Brief*, vol: 18, no: 4, March 12, 2018, p. 6.

67 Michael Forsythe, "As China's Leader Fights Graft, His Relatives Shed Assets," June 17, 2014, <https://www.nytimes.com/2014/06/18/world/asia/chinas-president-xi-jinping-investments.html> (accessed August 16, 2016).

68 Klaus Heinrich Raditio, "Opinion – Factors Giving Rise to Xi Coup Rumours in China," October 11, 2022, <https://www.e-ir.info/2022/10/11/opinion-factors-giving-rise-to-xi-coup-rumours-in-china/> (accessed November 1, 2022).

69 For a detailed analysis of the Bo Xilai affair, see Ahmet Devrim, "The Tremor in the Communist Party of China," November 8, 2012, <https://socialistproject.ca/2012/11/b725/> (accessed November 12, 2022).

sentenced to life in prison. His family's assets of 14 billion USD were seized.<sup>70</sup> The Zhou case, in which the tradition of not arresting serving or retired Politburo Standing Committee members was first violated, is one of the top-level purges in the CCP's history.<sup>71</sup>

Underestimating Xi's ambitions, Hu Jintao's "Communist Youth League" faction and Jiang Zemin's Shanghai clique cooperated with Xi in Bo Xilai's purge. However, they soon realized Xi posed as much danger to them as Bo did. As mentioned above, a *NYT* report revealed that former Premier Wen Jiabao's family accumulated \$2.7 billion. Duan Weihong, who assisted the Wen family in financial matters, was arrested in 2017. Wen pledged loyalty to Xi in exchange for the investigation not deepening.<sup>72</sup>

Xi did not stop at just suppressing his rivals but also aimed to homogenize the party further. In previous CCP administrations, there was a degree of tolerance for local experiments as long as they did not openly oppose or try to take over party leadership. For instance, Deng Xiaoping allowed alternative experiments like the Nanjie Village in Henan province, where agricultural production remained collectivized despite the nationwide decollectivization campaign. It is important to note that Deng's tolerance for Nanjie had more to do with controlling factional conflicts within the party than promoting democracy, especially considering his role in the 1989 Tiananmen Square massacre. Allowing such local initiatives created a space for different factions within the party. However, under Xi's leadership, this approach has been abandoned. The emphasis has shifted from the differences in these experiments to their conformity with "Xi Jinping Thought." This uniformity could hinder the controlled maintenance of diversity within the party and become a source of instability, contrary to Xi's intentions.<sup>73</sup>

In addition to corruption investigations, Xi attempted to exert strict control over large corporations through heavy regulations and record-high fines. As explained earlier, Xi does not intend to change capitalist production relations or reverse capitalist restoration. Instead, he aims to strengthen China's state capitalism. Given the global trend of declining neoliberalism and rising state intervention in the economy, especially after 2008, Xi's push for a more robust state intervention appears understandable. It is becoming routine for many states, including imperialist states, to intervene extensively in the economy to recover from economic crises. Given this broader context, increasing state intervention in the Chinese economy seems unsurprising.

During Xi's tenure, while the state intensified its economic intervention, efforts were made to weaken the financial speculator side of capital and strengthen the faction focusing on technological innovation. For example, Guo Guangchang, CEO

70 Benjamin Kang Lim and Ben Blanchard, "Exclusive: China Ex-security Chief Warned Bo Xilai He Would Be Ousted –Sources," April 15, 2015, <https://www.reuters.com/article/us-china-corruption-zhou-exclusive-idUSKBN0N610C20150415> (accessed August 16, 2016).

71 Olivia Cheung, "Factional Model-making in China: Party Elites' Open Political Contention in the Policy Process," *The China Quarterly*, vol: 251, 2022, p. 722.

72 Deng, "Who Are Xi's Enemies?"

73 Cheung, "Factional Model-making".

of Fosun International Limited, known as “China’s Warren Buffett,” was detained several times in 2015. In June 2017, the China Banking Regulatory Commission declared HNA, Fosun International Limited, Dalian Wanda Group, and Anbang Insurance Group (discussed earlier) as “systemic risks.” It started an investigation into their overseas investments. In February 2018, Anbang was nationalized, and its CEO, Wu Xiaohui, was arrested.<sup>74</sup>

Such investigations extended to China’s technology companies and digital platforms. The regulation of such firms and the sanctions imposed on them have recently become a significant part of capitalist states’ increasing economic intervention, including in the United States, European countries, Australia, Brazil, and India.<sup>75</sup> The Chinese state followed suit, but what sets Xi’s approach apart is the intertwining of these penalties with political interference and pressures. Xi cannot tolerate capitalists advocating loosening state capitalism and –even worse– those who (indirectly) question the CCP’s monopoly on power. By combining financial penalties with police repression, he sends a clear message to the bourgeoisie: “Toe the line.” The most famous CCP member of the bourgeoisie, Jack Ma, the owner of Alibaba, Alipay, and the Ant Group, dramatically faced this. After his comments in October 2020 about state banks being too risk-averse and stifling innovation, Ma disappeared for three months, sparking rumors of house arrest. The \$34 billion IPO of Ant Group on the Shanghai and Hong Kong stock exchanges was canceled at the last minute. In April 2021, Alibaba was fined \$2.8 billion for monopolistic practices, causing significant losses in Ant Group’s shares. Ultimately, Ma’s influence was curtailed.<sup>76</sup>

Other companies faced similar actions. In July 2022, Didi, an online transportation

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<sup>74</sup> Rithmire and Chen, p. 1049.

<sup>75</sup> Federal Trade Commission, “FTC Imposes \$5 Billion Penalty and Sweeping New Privacy Restrictions on Facebook,” July 24, 2019, <https://www.ftc.gov/news-events/news/press-releases/2019/07/ftc-imposes-5-billion-penalty-sweeping-new-privacy-restrictions-facebook> (accessed September 27, 2022); Foo Yun Chee, “Google Loses Challenge Against EU Antitrust Decision, Other Probes Loom,” September 14, 2022, <https://www.reuters.com/technology/eu-courts-wed-ruling-record-44-bln-google-fine-may-set-precedent-2022-09-14/> (accessed September 27, 2022); Sankalp Phartiyal, “Google Fined \$113 Million in Second India Antitrust Penalty,” October 25, 2022, <https://www.bloomberg.com/news/articles/2022-10-25/india-antitrust-body-fines-google-113-million-over-app-store> (accessed November 10, 2022); “Brazil Court Fines Apple, Orders to Sell iPhone With Charger,” October 13, 2022, <https://www.reuters.com/legal/brazil-court-fines-apple-orders-sell-iphone-with-charger-2022-10-13/> (accessed November 10, 2022); Aoife White, “Apple Prefers Fine to Obeying Antitrust Order, Vestager Says,” February 23, 2022, <https://www.bloomberg.com/news/articles/2022-02-23/apple-prefers-fines-to-obeying-antitrust-order-vestager-says> (accessed November 10, 2022); Josh Taylor, “Uber Faces \$26m Fine in Australia Over Misleading Cancellation Warnings and Taxi Fare Estimates,” April 26, 2022, <https://www.theguardian.com/australia-news/2022/apr/26/uber-faces-26m-fine-in-australia-over-misleading-cancellation-fee-charges-and-taxi-fare-estimates> (accessed November 10, 2022).

<sup>76</sup> Shuli Ren, “Jack Ma’s Blunt Words Just Cost Him \$35 Billion,” November 3, 2020, <https://www.bloomberg.com/opinion/articles/2020-11-03/jack-ma-s-blunt-china-bank-talk-cost-ant-its-35-billion-ipo> (accessed November 7, 2022); Sam Peach, “Why Did Alibaba’s Jack Ma Disappear for Three Months?,” March 20, 2021, <https://www.bbc.com/news/technology-56448688> (accessed November 7, 2022); Zheping Huang, “Alibaba’s First Sales Miss in Two Years Shows Crackdown Toll,” August 3, 2021, <https://www.bloomberg.com/news/articles/2021-08-03/alibaba-sales-miss-in-sign-spending-has-yet-to-pay-off> (accessed November 7, 2022).

platform often referred to as “China’s Uber,” was fined \$1.19 billion for violating data security.<sup>77</sup> Several online education companies partly listed on American stock exchanges faced heavy fines in 2021 for false advertising. In January 2013, a campaign initiated by a charity organization against food waste in Beijing quickly turned into a national campaign called “Clean Plate” under Xi’s leadership. A law against food waste was passed in April 2021. During the campaign, bureaucrats who feasted in luxury restaurants were targeted, and social media influencers who wasted enormous amounts of food in videos were reprimanded.<sup>78</sup> With all these measures, Xi attempted to portray himself as a leader fighting against illegitimate gains and greediness, striving for equal educational opportunities and caring for the ordinary people.

There were also purges with more explicit political motivations. For example, the Taishan Club, comprised of ultra-rich individuals mentioned earlier, was forced to disband in 2021.<sup>79</sup> In China, the children of old-generation party-state leaders who can rise to high positions are often called “princelings.” Some of these princelings not only advocate for a more liberal line economically but also criticize the CCP sometimes. Some of them fell out of favor with Xi. Ren Zhiqiang, known as “China’s Donald Trump” and a real estate mogul, was among the most famous. Xi began dealing with Ren as soon as he came to power. When CCTV, the state television that had never reported on Wen Jiabao’s enormous wealth, announced that Huayuan real estate company, owned by Ren, owed significant taxes to the state, Ren called CCTV “the dumbest pig on earth.” Ren was popular among the public, especially the middle class, for his frankness. He had 37 million followers on the social media platform Weibo. However, when Ren criticized Xi for turning “the people’s state” into “the party’s state,” his Weibo account was shut down. Ren was sentenced to 18 years in prison on charges of disinformation.<sup>80</sup> Another prominent representative of the prince generation (or “princess” in her case), Cai Xiang, a professor at the Central Party School’s Party Building Center, initially defended Ren Zhiqiang, attracting attention. Later, when she called Xi a “mafia boss” in a leaked phone conversation, she was expelled from the party and currently lives in exile in the United States.<sup>81</sup>

77 Evelyn Cheng, “China Fines Didi More Than \$1 Billion for Breaking Data Security Laws,” July 21, 2021, <https://www.cnbc.com/2022/07/21/china-fines-didi-more-than-1-billion-for-breaking-data-security-laws.html> (accessed November 7, 2022).

78 Bella Huang and Amy Qin, “Xi Declares War on Food Waste, and China Races to Tighten Its Belt,” August 21, 2020, <https://www.nytimes.com/2020/08/21/world/asia/china-food-waste-xi.html> (accessed November 4, 2022).

79 Zheng, “Taishan Club”; Yuan, “Taishan Club.”

80 Amy Li, “Property tycoon Ren Zhiqiang slams CCTV as ‘the dumbest pig on earth’,” January 3, 2014, <https://www.scmp.com/news/china-insider/article/1396501/property-tycoon-ren-zhiqiang-slams-cctv-dumbest-pig-earth> (accessed November 9, 2022); Chris Buckley, “China’s ‘Big Cannon’ Blasted Xi. Now He’s Been Jailed for 18 Years,” September 22, 2020, <https://www.nytimes.com/2020/09/22/world/asia/china-ren-zhiqiang-tycoon.html> (accessed November 9, 2022).

81 Jeremy Goldkorn, “Retired Professor Who Called Xi Jinping ‘Mafia Boss’ Expelled from Party,” August 18, 2020, <https://thechinaproject.com/2020/08/18/retired-professor-who-called-xi-jinping-mafia-boss-expelled-from-party/> (accessed November 9, 2022).

## *The magnificent success and tragic failure of China's pandemic response*

When considering the Xi era, one cannot ignore the COVID-19 pandemic. What was and was not done in the fight against the pandemic revealed the perspective, power, and weaknesses of the Xi administration. In December 2019, when news of the outbreak started coming from Wuhan city of Hubei province in central China, the CCP's initial response was to detain those spreading the word, censor social media, and deny the epidemic. Official media claimed that the outbreak rumors were false and aimed to incite panic among the public.<sup>82</sup> When the crisis could no longer be ignored, the Chinese government approached the matter seriously. Measures such as restricting entry to and exit from the country, implementing lockdowns, conducting frequent tests on the entire population, and isolating positive cases until they tested negative were immediately put into practice. A successful 76-day lockdown in Wuhan, a city with a population of over 10 million, marked the end of the first wave of the pandemic. During this initial phase, state institutions succeeded in mobilizing the public in the fight against the pandemic.<sup>83</sup>

Furthermore, from the beginning of 2020, the Chinese government began sharing information it gathered about COVID-19 with the world and started issuing warnings, including the immediate implementation of measures such as mask usage. With the confidence gained from the successful Wuhan lockdown, the state adopted lockdown as a fundamental strategy in the fight against the pandemic. This strategy, known as the "Zero-COVID" policy, became one of the key motifs of Xi's attempt to create an image as a leader above classes and a tool to bring capitalists and bureaucrats in line. This approach conveyed that the party-state under Xi's leadership prioritized human life over capitalist profits. The uncompromising implementation of the "Zero-COVID" policy was defined as one of the fundamental criteria for loyalty to the party and the state. Officials suspected of deviating from this line were punished.<sup>84</sup>

While the world experienced humanitarian and economic devastation in 2020 due to the pandemic, China became the most successful country in fighting it thanks to its "Zero-COVID" policy.<sup>85</sup> The rest of the country was relatively unaffected by the pandemic thanks to the Wuhan quarantine. While the world's average per capita income decreased by 4.3% in 2020, it increased by 2% in China. In 2021, the world

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82 On January 1, 2020, the Chinese state mouthpiece *Global Times* announced that eight people were arrested for spreading rumors of an epidemic in Wuhan ("Seafood Market Closed After Outbreak of 'Unidentified' Pneumonia," January 1, 2020, <https://www.globaltimes.cn/content/1175369.shtml> (accessed December 30, 2021)). On January 29, 2020, *Global Times* wrote that those eight people are commendable for alerting the public ("Eight Wuhan Residents Praised for 'Whistle-blowing' Virus Outbreak," January 29, 2020, <https://www.globaltimes.cn/content/1177960.shtml> (accessed December 30, 2021)).

83 Yan Hairong, "Mode Switching: The State, Market, and Anti-Covid-19 Shadow of Socialism in China," *Dialectical Anthropology*, vol: 44, 2020, pp. 213-221.

84 William Zheng, "Beijing Punishes Dozens of Officials Over Latest Wave," *South China Morning Post*, March 22, 2022.

85 On China's early success in pandemic control, see Ertuğrul Oruç, "Humanity Faces the COVID-19 Pandemic," *Revolutionary Marxism* 2021, pp. 137-139.

average rose by 4.8%, and China's by 8%.<sup>86</sup> In short, China's economic performance diverged positively from the rest of the world in the first two years of the pandemic. Chinese companies also successfully produced large quantities of masks, test kits, and inactivated vaccines. Approximately 90% of the population was vaccinated.<sup>87</sup> The Chinese government also turned the pandemic into a diplomatic opportunity by donating vaccines and masks to poor countries.<sup>88</sup>

However, since the end of 2021, the limits of this policy began to emerge. The perception that mRNA vaccines developed by Western companies like Moderna and Pfizer-BioNTech were much more successful in providing immunity compared to the inactivated vaccines developed by Chinese companies like Sinovac and Sinopharm became widespread.<sup>89</sup> In March 2020, an agreement was made between China's Fosun Pharma and the American company Pfizer to import the Pfizer-BioNTech mRNA vaccine into China. However, the Xi administration did not approve this agreement.<sup>90</sup> Instead, an economic nationalist, import-substitution policy was adopted, envisioning the production of mRNA vaccines by China's domestic companies. On one hand, through official media channels, the fallacy that China's inactivated vaccines were more effective than the Western mRNA vaccines was spread,<sup>91</sup> and on the other hand, Chinese companies were tasked with developing mRNA vaccines.<sup>92</sup> At least eight Chinese companies attempted to develop mRNA vaccines.<sup>93</sup> However, these efforts failed to provide mRNA vaccines to the Chinese

<sup>86</sup><https://data.worldbank.org/indicator/NY.GDP.PCAP.KD.ZG?end=2021&locations=CN-1W&start=2019> (accessed November 11, 2022).

<sup>87</sup> "Lockdown Pain Fails to Break Elderly Vaccine Resistance in China," July 5, 2022, <https://www.bloomberg.com/news/articles/2022-07-04/lockdown-pain-fails-to-break-elderly-vaccine-resistance-in-china> (accessed November 11, 2022).

<sup>88</sup> Moritz Rudolf, "China's Health Diplomacy during Covid-19: The Belt and Road Initiative (BRI) in Action," January 26, 2021, <https://www.swp-berlin.org/en/publication/chinas-health-diplomacy-during-covid-19> (accessed March 7, 2021).

<sup>89</sup> According to a study conducted in Hong Kong and published in *The Lancet*, two doses of inactivated CoronaVac vaccine are ineffective in creating immunity compared to two doses of the Pfizer-Biontech mRNA vaccine. However, when both vaccines are administered in three doses, the difference in effect between them closes. It is impossible to predict whether the findings of this study will be questioned by other studies in the future. However, even if we accept this study as correct, the result does not change. The pre-peer reviewed version of the research was published on March 22, 2022. The peer-reviewed version was published on July 15, 2022 (Marchina E McMenamin, Joshua Nealon, Yun Lin, Jessica Y Wong, Justin K Cheung, Eric H Y Lau, Peng Wu, Gabriel M. Leung, Benjamin J Cowling, "Vaccine Effectiveness of One, Two, and Three Doses of BNT162b2 and CoronaVac Against COVID-19 in Hong Kong: A Population-based Observational Study," *Lancet Infectious Diseases*, vol: 22, no: 9, 2022, pp. 1435-1443). The Chinese state accepted the necessity of the mRNA vaccines in 2020 and supported domestic companies' projects in this direction. Lengthy and large-scale quarantines were also adopted in the same context. Thus, the findings of the abovementioned study do not change the picture we draw here.

<sup>90</sup> Yvaine Ye, "China's First mRNA Vaccine Is Close— Will That Solve Its COVID Woes?," June 27, 2022, <https://www.nature.com/articles/d41586-022-01690-3> (accessed November 1, 2022).

<sup>91</sup> "Chinese Media Criticise Pfizer COVID-19 Vaccine, Tout Local Shots," January 20, 2021, <https://www.reuters.com/article/us-health-coronavirus-vaccine-china-idUSKBN29P1HT> (accessed November 1, 2022).

<sup>92</sup> Eleanor Olcott, "China Rushes to Develop mRNA Vaccine As Doubts Grow Over Local Jabs," January 6, 2022, <https://on.ft.com/3EYJOGI> (accessed November 1, 2022).

<sup>93</sup> Hu Yuwei, "Can SinoBIO's COVID-19 mRNA Vaccine Receives Approval for Clinical Trial Application in China," April 4, 2022, <https://www.globaltimes.cn/page/202204/1257491.shtml> (ac-

people on time. While Western mRNA vaccines were administered globally in 2021, China lacked mRNA vaccines. Additionally, the Moderna company rejected China's request for information and technology sharing regarding mRNA vaccines.<sup>94</sup> Chinese authorities approved the first domestically developed mRNA COVID vaccine (developed by the CSPC Pharmaceutical Group Ltd.) in March 2023, long after the end of the pandemic.<sup>95</sup>

The dependence of the Chinese people on inactivated vaccines, which are thought to have a lower efficacy level, forced the government to implement extended lockdowns with each new outbreak. This situation began to squeeze the country economically in 2022. Shanghai, one of China's most prominent metropolises, went through a lengthy lockdown in April and May 2022.<sup>96</sup> Long-term lockdowns were also experienced in other cities. This state of deadlock extensively tested the patience of the public. In short, Xi's inflexible vaccine nationalism collided with the reality that China is still far behind the West in science and technology, leading to its failure. This failure demonstrates the immense difficulty of China, a semi-peripheral country, to become an imperialist power. We will return to this topic at the end of this article when analyzing the November 2022 wave of social unrest.

### ***The Belt and Road Initiative, Made in China 2025 and the imperialist backlash***

After analyzing the domestic contradictions, we can finally move on to the antagonisms on the international plane. As I noted previously, the contradictions between the imperialist camp and China's semi-peripheral capitalism have intensified since the beginning of the Third Great Depression. Two strategies bearing Xi's stamp have escalated this conflict. The first is the Belt and Road Initiative (BRI), launched in 2013. The BRI aims to enhance China's access to raw materials and boost its exports by developing transportation and logistics infrastructure across Eurasia, Africa, and Latin America. Within the BRI framework, the Asian Infrastructure Investment Bank (AIIB), established in 2015 with one-third of its financing provided by China, aims to be an alternative to the U.S.-controlled World Bank, which has traditionally exerted significant influence over large-scale infrastructure projects in peripheral and semi-peripheral countries. To date, 148 countries have joined the BRI by signing a Memorandum of Understanding (MoU) with the PRC.<sup>97</sup> However, it is essential to remember that most of these countries are

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cessed November 1, 2022).

94 Sun Yu, Eleanor Olcott, and Donato Paolo Mancini, "Moderna Refused China Request to Reveal Vaccine Technology," October 2, 2022, <https://on.ft.com/3dSufv2> (accessed October 2, 2022).

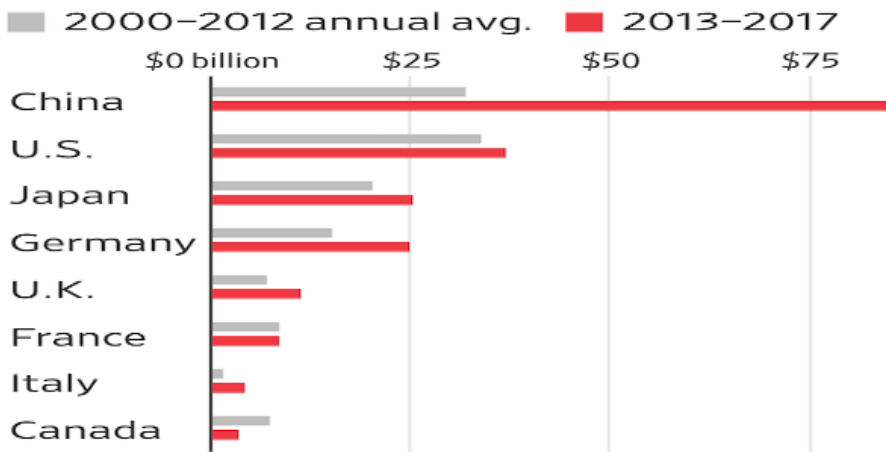
95 "China OKs its First mRNA Vaccine, from Drugmaker CSPC," March 22, 2023, [https://www.reuters.com/business/healthcare-pharmaceuticals/china-approves-its-first-mrna-vaccine-domestic-drugmaker-cspc-2023-03-22/#:~:text=BEIJING%2C%20March%2022%20\(Reuters\),shots%20to%20support%20domestic%20research](https://www.reuters.com/business/healthcare-pharmaceuticals/china-approves-its-first-mrna-vaccine-domestic-drugmaker-cspc-2023-03-22/#:~:text=BEIJING%2C%20March%2022%20(Reuters),shots%20to%20support%20domestic%20research) (accessed March 25, 2023).

96 "Shanghai Eases Covid Restrictions As Two-month Lockdown Ends," June 1, 2022, <https://www.france24.com/en/asia-pacific/20220601-shanghai-eases-covid-restrictions-as-two-month-long-lockdown-ends> (accessed November 1, 2022).

97 Christoph Nedopil, "Countries of the Belt and Road Initiative," <https://greenfdc.org/countries->

not necessarily “pro-China” but seek to benefit from the U.S.-China competition by obtaining cheap loans and grants from China.

The BRI faces several significant challenges. The Chinese state struggles to collect the loans it has provided under the initiative. Debtor states use the leverage of approaching the West to secure concessions such as loan postponements and cancellations. In addition to the ongoing – and aggravating – domestic debt problem, unpaid BRI loans strain China’s government finances significantly.<sup>98</sup> Furthermore, as seen in cases like Sri Lanka, when the Chinese state attempted to seize infrastructure built with uncollected loans, it was accused of being “imperialist” by Western media and governments. China tends to back down quickly due to these allegations.<sup>99</sup>



Source: AidData

**Figure 6. International development finance provided by China and the G7 countries, 2000-2017 (Billion USD)<sup>100</sup>**

The “Made in China 2025” strategic plan announced in 2015 was Xi’s most critical step to compete with imperialist economies. This plan aims to shift China from low-tech and low-value-added production based on semi-skilled and cheap labor to high-tech and high-value-added production based on skilled labor. In this

of-the-belt-and-road-initiative-bri/ (accessed August 23, 2023).

98Lingling Wei, “China Reins In Its Belt and Road Program, \$1 Trillion Later,” September 26, 2022, <https://www.wsj.com/articles/china-belt-road-debt-11663961638> (accessed September 26, 2022).

99 Deborah Brautigam and Meg Rithmire, “The Chinese ‘Debt Trap’ Is a Myth,” February 6, 2021, <https://www.theatlantic.com/international/archive/2021/02/china-debt-trap-diplomacy/617953/> (accessed February 9, 2021).

100 Ibid.

context, the goals of increasing the country's self-sufficiency rate to 70% in 2025 in products determined as "main materials," especially semiconductors (microchips), and dominating the world technology market in 2049, the 100<sup>th</sup> anniversary of the founding of the People's Republic of China.<sup>101</sup> Considering that technological superiority is one of the defining features of imperialist economies,<sup>102</sup> the Chinese state's quest for technological development must be understood as a crucial part of a broader attempt to join the imperialist league.

The imperialist camp reacted sharply to "Made in China 2025" and the Belt and Road Initiative. Donald Trump started the trade war against China on July 6, 2018, by placing an additional 25% tariff on \$34 billion worth of products from China. In the following period, extra customs duties were imposed.<sup>103</sup> Significant steps have been taken to weaken China's leading high-tech manufacturing companies, such as Huawei and ZTE. ZTE was sentenced to pay 1 billion 190 million USD in compensation to the USA on the grounds that it did not comply with the U.S. sanctions against Iran and North Korea.<sup>104</sup> As a result of the USA's complaint for the same reason, Meng Wanzhou, the daughter of the founder of the Huawei company and its senior manager, was kept under house arrest in Canada between 2018-2021.<sup>105</sup> The US blacklisted Huawei in 2019, banning the sale of key technologies, especially microchips, to this company.<sup>106</sup>

Joe Biden took the war that Trump started to a higher level. On October 7, 2022, the Biden administration brought the condition of obtaining permission from the US to sell microchips produced using US technology to Chinese companies, wherever they are in the world. Within the scope of this ban, obstacles were placed in front of US citizens and green card holders from working in microchip production in China.<sup>107</sup> Given the enormous power of the United States in semiconductor production, this

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101 James McBride and Andrew Chatzky, "Is 'Made in China 2025' a Threat to Global Trade?," May 13, 2019, <https://www.cfr.org/backgrounder/made-china-2025-threat-global-trade> (accessed December 21, 2021).

102 On the differences between imperialist and non-imperialist economies, see Guglielmo Carchedi and Michael Roberts, "The Economics of Modern Imperialism," *Historical Materialism*, vol. 29, no: 4, 2021, pp. 23-69; Levent Dölek, "The Myth of Russian Imperialism: Why Neutrality on the Ukraine War is Wrong," *Revolutionary Marxism 2022*, pp. 42-47. For a comprehensive review of the technological dimension of imperialism and analysis of the non-imperialist character of Chinese capitalism, see Sam King, *Imperialism and the Development Myth: How Rich Countries Dominate in the Twenty-First Century*, Manchester: Manchester University Press, 2021. For a detailed account of China's semi-peripheral character, see Minqi Li, "China: Imperialism or Semi-Periphery?," July 1, 2021, <https://monthlyreview.org/2021/07/01/china-imperialism-or-semi-periphery/> (accessed October 12, 2021).

103 "US-China Trade War Timeline: Key Dates and Events Since July 2018," August 29, 2021, <https://www.scmp.com/economy/china-economy/article/3146489/us-china-trade-war-timeline-key-dates-and-events-july-2018> (accessed December 21, 2021).

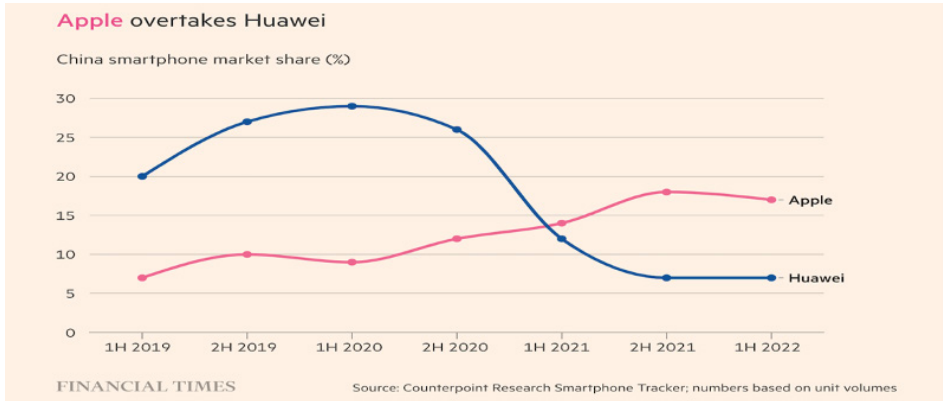
104 Paul Mozur and Cecilia Kang, "U.S. Fines ZTE of China \$1.19 Billion for Breaching Sanctions," March 7, 2017, <https://www.nytimes.com/2017/03/07/technology/zte-china-fine.html> (accessed December 21, 2021).

105 "Huawei Executive Meng Wanzhou Freed by Canada Arrives Home in China," September 25, 2021, <https://www.bbc.com/news/world-us-canada-58690974> (accessed December 21, 2021).

106 "US-China Trade War Timeline."

107 Alan Beattie, "Biden Goes It Alone in His Trade Assault on China," October 20, 2022, <https://on.ft.com/3MJC9BE> (accessed October 31, 2022).

decision is understandable as a comprehensive embargo on China. These regulations have already strained China's technological development. Huawei, which was said to shake Apple's dominance just a few years ago, could not achieve its 5G modernization goals because of US sanctions and even fell back against Apple in China's domestic market.<sup>108</sup>



**Figure 7. The share of Apple and Huawei in China's domestic market from 2019 to the first half of 2022<sup>109</sup>**

In addition to the economic war, China has also faced a comprehensive military/geopolitical siege by the West. The “Quadrilateral Security Dialogue” (Quad), established in 2007 with the participation of the USA, Australia, Japan, and India, was defined as the “Asia-Pacific NATO” by China.<sup>110</sup> However, Quad was short-lived and failed to translate into tangible collaboration. The Quad pact, revived by Trump in 2017, has sought expansion since 2020 by including Brazil, South Korea, Israel, Vietnam, and New Zealand in its summit meetings.<sup>111</sup> The US, Britain, and Australia formed the Aukus pact against China in the Indo-Pacific region in 2021.<sup>112</sup> More importantly, NATO put China on target. The communiqué of NATO's Brussels Summit on June 14, 2021, stated: “China's stated ambitions and assertive behaviour present systemic challenges to the rules-based international order and to

<sup>108</sup> Qianer Liu, “Huawei to Relaunch 5G Phone Despite US Sanctions,” October 6, 2022, <https://on.ft.com/3Ep3nvc> (accessed October 6, 2022).

<sup>109</sup> Patrick McGee and Ryan McMorow, “Apple's Bargain with Beijing: Access to China's Factories — and Consumers,” November 8, 2022, <https://on.ft.com/3DRqgp5> (accessed November 8, 2022).

<sup>110</sup> Yao Zeyu and Zhang Tengjun, “US Attempt to Upgrade Quad to an Asia-Pacific NATO Destined to Fail,” May 23, 2022, <https://www.globaltimes.cn/page/202205/1266370.shtml> (accessed October 31, 2022).

<sup>111</sup> Jagannath Panda, “Making ‘Quad Plus’ a Reality,” January 13, 2022, <https://thediplomat.com/2022/01/making-quad-plus-a-reality/> (accessed October 31, 2022).

<sup>112</sup> “Aukus: UK, US and Australia Launch Pact to Counter China,” September 16, 2021, <https://www.bbc.com/news/world-58564837> (accessed October 31, 2022).

areas relevant to Alliance security.”<sup>113</sup> The communiqué of NATO’s Madrid Summit on June 29, 2022, declared: “We face systemic competition from those, including the People’s Republic of China, who challenge our interests, security, and values and seek to undermine the rules-based international order.”<sup>114</sup> The communiqué of the Vilnius Summit on July 11, 2023, repeated the same argument: “The People’s Republic of China’s (PRC) stated ambitions and coercive policies challenge our interests, security and values.”<sup>115</sup>

An alternative global investment framework is also on the agenda to prevent the Belt-Road Initiative from bringing peripheral and semi-peripheral countries closer to China. For this purpose, the USA, Japan, and Australia established the “Blue Dot Network” in November 2019.<sup>116</sup> A new initiative called “Build Back Better World” (B3W) was launched at the G7 summit in July 2021, which brought together the USA, Germany, Britain, Italy, Japan, Canada and France.<sup>117</sup>

China was also targeted because it continued its economic and political relations with Russia after the Ukraine War.<sup>118</sup> Finally, the Taiwan question, which brought China and the United States to the brink of war in 1996, began to itch again. The visit of Nancy Pelosi, the speaker of the United States House of Representatives, to Taiwan in August 2022 can be interpreted as an exercise in the US’ future diplomatic recognition of Taiwan’s independence.<sup>119</sup> Xi Jinping has repeatedly declared that if this happens, he will not hesitate to go to war to connect Taiwan to the mainland.<sup>120</sup> Xinjiang’s strategic importance in the context of the Belt-Road Initiative should also be kept in mind, with Tibet being a critical region for the Sino-Indian border conflict. The repressive attitude of the Chinese state in these areas gave a serious trump card to the imperialists. The Western press and governments have launched a severe propaganda attack on these issues in recent years.

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113 NATO, “Brussels Summit Communiqué,” June 14, 2021, [https://www.nato.int/cps/en/natohq/news\\_185000.htm](https://www.nato.int/cps/en/natohq/news_185000.htm) (accessed October 31, 2022).

114 NATO, “Madrid Summit Declaration,” June 29, 2022, [https://www.nato.int/cps/en/natohq/official\\_texts\\_196951.htm](https://www.nato.int/cps/en/natohq/official_texts_196951.htm) (accessed October 31, 2022).

115 NATO, “Vilnius Summit Communiqué,” July 11, 2023, [https://www.nato.int/cps/en/natohq/official\\_texts\\_217320.htm](https://www.nato.int/cps/en/natohq/official_texts_217320.htm) (accessed August 28, 2023).

116 Kaush Arha, “A Hidden Key to the G7’s Infrastructure Ambitions: Blue Dot Network,” June 12, 2021, <https://www.atlanticcouncil.org/blogs/new-atlanticist/a-hidden-key-to-the-g7s-infrastructure-ambitions-blue-dot-network/> (accessed March 1, 2022).

117 Mordechai Chaziza, “The ‘Build Back Better World’: An Alternative to China’s BRI for the Middle East?,” July 20, 2021, <https://www.mei.edu/publications/build-back-better-world-alternative-chinas-bri-middle-east> (accessed November 12, 2021).

118 “‘Gigantic Mistake’: Biden Warned China’s Xi Over Aiding Russia,” September 19, 2022, <https://www.aljazeera.com/news/2022/9/19/gigantic-mistake-biden-warned-chinas-xi-over-aiding-russia> (accessed October 31, 2022).

119 Yılmaz Tan, “Çip Savaşından Askeri Gerilime Tayvan’da Ne Oluyor?,” September 21, 2022, <https://gercekgazetesi1.net/uluslararasi/cip-savasindan-askeri-gerilime-tayvanda-ne-oluyor> (accessed October 31, 2022).

120 Ben Blanchard and Yimou Lee, “China’s Xi Threatens Taiwan with Force but also Seeks Peaceful ‘Reunification’,” January 2, 2019, <https://www.reuters.com/article/us-china-taiwan-idUSKCN1OW04K> (accessed October 31, 2022).

## The significance of the 20<sup>th</sup> Congress

The abovementioned issues shadowed the CCP 20<sup>th</sup> Congress. X's primary expectation from Congress was to eliminate the term limits, known as the "two-term rule," allowing him to remain at the helm of the party-state as long as his health permits. As is known, similar to the governance structure adopted by the Communist Party of the Soviet Union after Stalin, the Chinese Communist Party transitioned from a personality-based rule under Mao to a collective dictatorship of the bureaucracy under Deng Xiaoping. Although Deng managed the party and the state from behind the scenes until he died in 1997, even when he held no official positions, he believed that the collective rule by the bureaucracy was more suitable for ensuring the regime's stability than a one-man rule. In 1982, Deng secured an amendment to the constitution to limit the presidential term to two terms, i.e., ten years. However, in China, the presidency is essentially a symbolic position, while the real power lies in the hands of the Party General Secretary. No specific rules were imposed regarding the General Secretary's term. Since 1993, the positions of General Secretary and President have been held by the same individuals, which led to the assumption that the two-term rule applied to both posts. However, there has never been a strictly binding second-term rule for general secretaries. It could be described more as a customary practice. In 2018, Xi prepared the groundwork to eliminate this tradition by amending the constitution and removing the term limit for the President.<sup>121</sup> From that moment on, the term of office ceased to be a legal matter and became a critical battleground within the party-state power struggle.

Xi Jinping saw the 20<sup>th</sup> Congress as a golden opportunity to deal a decisive blow to his (already significantly weakened) rivals within the party. Recognizing the influence of retired cadres in power struggles within the party since the Deng era, Xi knew the necessity of bringing that group under control. As mentioned earlier, Hu Jintao headed the Communist Youth League faction, and Jiang Zemin led the Shanghai faction.<sup>122</sup> Therefore, silencing the retired leaders and officials was crucial for Xi's political fate. For this reason, six months before the Congress, the CCP Central Committee General Office (also known as the "Central Office") issued a regulation titled "Strengthening Party Building Among Retired Cadres in the New Era." This regulation directed retired cadres "not to discuss the general policies of the Party Central Committee in an open manner, not to spread political negative remarks, not to participate in the activities of illegal social organisations, and not to use their former authority or position influence to seek benefits for themselves and others, and resolutely oppose and resist all kinds of wrong thinking."<sup>123</sup> In short, the regulation instructed former officials to remain silent on any matter Xi might find displeasing.

Adding a ban on public speeches to the already looming threat of corruption

121 Ling Li, "The Muddled Case Against Xi Jinping's Third Term," March 31, 2022, <https://blogs.lse.ac.uk/cff/2022/03/31/the-muddled-case-against-xi-jinpings-third-term/> (accessed November 11, 2022).

122 Jiang Zemin died on November 30, 2022.

123 Guo Rui, "Retired Cadres Warned About 'Negative' Speeches," *South China Morning Post*, May 17, 2022.

further helped to undermine the influence of retired cadres. However, there was a notable exception to this rule. Song Ping, the oldest and most senior cadre of the CCP, aged 105, stated in a video message released in September 2022 that the policy of reform and opening-up “has been the only path to the development and progress of contemporary China and the only path to the realization of the Chinese dream.” Song, who played a crucial role in bringing the Hu-Wen duo to power, interpreted this statement as a warning to Xi not to deviate from the path of the previous administrations.<sup>124</sup> Following this statement, rumors circulated that the former cadres were taking action to overthrow Xi. In the lead-up to the Congress, media affiliated with the Falun Gong organization (a right-wing opposition group with considerable underground activity in the mainland and a strong diaspora presence, particularly in North America) alleged that Song Ping, Hu Jintao, and Wen Jiabao were involved in a coup attempt against Xi.<sup>125</sup> The US-controlled Radio Free Asia also published a piece claiming that the Hu-Wen team was planning a successful coup to overthrow Xi.<sup>126</sup>



**Song Ping at the 20<sup>th</sup> Congress**

In addition to the internal unrest within the party, an individual protest just three days before the 20<sup>th</sup> Congress cast a shadow over the event. On October 13, 2022, two banners were hung by a protester on Beijing’s Sitong Bridge. One banner read: “We want to eat, not do coronavirus tests; reform, not the Cultural Revolution. We want

124 Katsuji Nakawaza, “Analysis: 105-year-old Party Elder Sends Blunt Message to Xi,” September 29, 2022, <https://asia.nikkei.com/Editor-s-Picks/China-up-close/Analysis-105-year-old-party-elder-sends-blunt-message-to-Xi> (accessed November 8, 2022).

125 Helen Davidson, “China Becomes ‘Hothouse’ of Intrigue Ahead of Crucial Communist Party Congress,” September 26, 2022, <https://www.theguardian.com/world/2022/sep/26/china-becomes-hothouse-of-intrigue-ahead-of-crucial-communist-party-congress> (accessed October 23, 2022).

126 Liang Jing, “胡温联手，习近平大势已去，二十大成功有望,” September 27, 2022, <https://www.rfa.org/cantonese/commentaries/lj/com-09272022094621.html?encoding=simplified> (accessed October 23, 2022).

freedom, not lockdowns; elections, not rulers. We want dignity, not lies. Be citizens, not enslaved people.” The other banner directly targeted Xi: “Remove dictator and national traitor Xi Jinping.” The protester was swiftly detained, but despite the state’s tight digital control, news of the incident spread rapidly. Sympathizing with the protest, many people drew a parallel between the protester and the “Tank Man,” the unidentified individual who bravely stood before the tanks in Tiananmen Square on June 5, 1989.<sup>127</sup> This incident demonstrated that the suppressed anger among the people could erupt unexpectedly, hinting at the first signs of an emerging wave of protests following the Congress.



### **An individual protest at the Sitong Bridge in Beijing short before the 20<sup>th</sup> Congress (October 13, 2022)**

A test case for Xi’s degree of dominance within the party was the election of the seven-member Politburo Standing Committee, the highest organ of the CCP. The question of who would become the second figure in the party, that is, the person who would take over as the head of the State Council (Prime Minister), was significant. The current Premier, Li Keqiang, who came from the Communist Youth League (and hence was close to the Hu-Wen duo), could not prevent Xi’s rise to one-man rule. Still, he acted autonomously on specific issues to somewhat balance Xi’s power. However, Xi did not want to work with a Premier who would potentially balance his authority. Therefore, the identity of the second-in-command within the Politburo Standing Committee was crucial. There were three candidates for this position. While it was known that Xi’s candidate was Li Qiang, it was speculated that rival factions supported Hu Chunhua and Wang Yang (especially Hu). It was a subject of curiosity whether Xi would abandon Li Qiang, who was

<sup>127</sup> Christian Shepherd, “‘New Tank Man’: Rare Protest in Beijing Marks Xi Jinping’s Moment,” October 14, 2022, <https://www.washingtonpost.com/world/2022/10/14/china-protest-sitong-bridge-haidian/> (accessed October 16, 2022).

perceived to have mishandled the COVID-19 outbreak in Shanghai and opt for Hu Chunhua. However, Xi did not change his decision and appointed Li as the second-in-command within the Politburo Standing Committee.<sup>128</sup> In short, the Congress consolidated Xi's dominance over the party.

Another point worth mentioning about the Congress is the absence of symbolic representation of women in party leadership. Thus far, no woman has been elected to the Politburo Standing Committee. However, women could be elected to the larger and less powerful Politburo. Unlike the previous four congresses, no woman was elected to the Politburo in the 20<sup>th</sup> Congress.<sup>129</sup>



**When Hu Jintao was hastily escorted out of the congress, Xi and Li avoided eye contact (October 22, 2022).**

The most talked-about moment of the Congress was when Hu Jintao, sitting next to Xi due to his former position as General Secretary, was hastily removed from the venue on the last day. Footage captured by cameras showed Hu attempting to open a file in front of him. He was first prevented by Li Zhanshu, the third-ranking official in the party, and then forcibly escorted out of the hall despite his objections. During this incident, Xi Jinping and others in the room appeared indifferent and cold. The true nature of the incident may never come to light. Nevertheless, this event, occurring precisely when retired cadres were being controlled, became one of the symbols of Xi's efforts to establish absolute dominance over the party.

The significance of Hu Jintao's removal lies in its potential implications of Xi

<sup>128</sup> Ceren Ergenç, "Çin'in Yeni 'İkinci Adam'ı Kim Olacak?," August 30, 2022, <https://www.evrensel.net/yazi/91509/cinin-yeni-ikinci-adami-kim-olacak> (accessed November 8, 2022).

<sup>129</sup> Alexandra Stevenson, "Leadership Changes Reveal That in China, Men Still Rule," October 23, 2022, <https://www.nytimes.com/2022/10/23/world/asia/women-china-party-congress.html> (accessed November 8, 2022).

Jinping consolidating his authority and sending a clear message of his control over the party. The incident showcased Xi's determination to eliminate any perceived opposition or dissent within the party ranks and solidify his position as the paramount leader. The removal of a former General Secretary, who once held the most powerful position in the party, demonstrated the extent to which Xi was willing to assert his control and authority. While the specific reasons behind Hu Jintao's removal may remain undisclosed, its timing and handling spoke volumes about Xi's quest for unchallenged supremacy.

### ***Attempts to build a personality cult***

After these notes, we can move on to the congressional documents. The report presented by Xi Jinping on the first day of the Congress and the new Party Constitution adopted on the last day of Congress are critical documents related to the economic and political issues and intra-party conflicts we discussed throughout the article. It is customary for CCP general secretaries to praise themselves after highlighting the achievements of previous administrations in their congress reports. The same happened at this convention. In his report, Xi presents the party's history as a success story that has reached a new high at every stage. After these customary praises, however, Xi made the following veiled (but harsh) criticisms of the Hu-Wen administration:

A decade ago this was the situation we faced:

Great achievements had been secured in reform, opening up, and socialist modernization, and notable advances had been made in the great new project of Party building. All this had created solid foundations, favorable conditions, and key underpinnings for our continued progress.

At the same time, however, a number of prominent issues and problems—some of which had been building for years and others which were just emerging—demanded urgent action.

Inside the Party, there were many issues with respect to upholding the Party's leadership, including a lack of clear understanding and effective action as well as a slide toward weak, hollow, and watered-down Party leadership in practice. Some Party members and officials were wavering in their political conviction. Despite repeated warnings, pointless formalities, bureaucratism, hedonism, and extravagance persisted in some localities and departments. Privilege-seeking mindsets and practices posed a serious problem, and some deeply shocking cases of corruption had been uncovered.

China's economy was beset by acute structural and institutional problems. Development was imbalanced, uncoordinated, and unsustainable, and the traditional development model could no longer keep us moving forward. Some deep-seated problems in institutions and barriers built by vested interests were becoming more and more apparent.

Some people lacked confidence in the socialist political system with Chinese characteristics, and, all too often, we saw laws being ignored or not being strictly enforced.

Misguided patterns of thinking such as money worship, hedonism, egocentricity, and historical nihilism were common, and online discourse was rife with disorder. All this had a grave impact on people's thinking and the public opinion environment.

Our work to ensure the people's wellbeing was fraught with weak links. Tightening resource and environmental constraints and environmental pollution were pronounced.

The systems for safeguarding national security were inadequate, and our capacity for responding to various major risks was insufficient. Many shortcomings were affecting the modernization of national defense and the military.

The institutions and mechanisms for implementing the policy of One Country, Two Systems in Hong Kong and Macao were not well-developed, and China faced grave challenges to its national security.

These were just some of the problems we faced. Back then, many people, both in and outside of our Party, were worried about the future of the Party and the country.<sup>130</sup>

In the continuation of his speech, Xi claims that decisive and successful steps were taken to solve these problems during his term. He then presents his rule as the third major period of the People's Republic of China, after the periods of Mao and Deng:

Based on our decades of exploration and practice since the founding of the People's Republic of China in 1949, especially since the launch of reform and opening up in 1978, as well as the new breakthroughs made in theory and practice since the 18<sup>th</sup> National Congress, we have succeeded in advancing and expanding Chinese modernization.<sup>131</sup>

The new CCP Constitution adopted at the congress also presents Xi as the third most important leader in the party's history:

The Communist Party of China uses Marxism-Leninism, Mao Zedong Thought, Deng Xiaoping Theory, the Theory of Three Represents, the Scientific Outlook on Development, and Xi Jinping Thought on Socialism with Chinese Characteristics for a New Era as its guides to action.<sup>132</sup>

The "Theory of Three Represents" referred to here was formulated by Jiang Zemin, and the "Scientific Outlook on Development" was put forward by Hu Jintao. However, since Jiang and Hu did not dare to equate themselves with Mao and Deng, they did not add their names to the beginning of their ideas and did not pretend to be the lead theorists. On the other hand, Xi put his name next to Mao and Deng, aiming to mark a "New Era" that he implies will last a long time. In keeping with this approach, the Party Constitution describes Xi as the core of the party leadership:

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130 Xi Jinping, "Hold High the Great Banner of Socialism with Chinese Characteristics and Strive in Unity to Build a Modern Socialist Country in All Respects (Report to the 20<sup>th</sup> National Congress of the Communist Party of China)," October 16, 2022," [https://www.fmprc.gov.cn/eng/zxxx\\_662805/202210/t20221025\\_10791908.html](https://www.fmprc.gov.cn/eng/zxxx_662805/202210/t20221025_10791908.html) (accessed October 25, 2022), pp. 4-5.

131 *Ibid.*, p. 18.

132 "Constitution of the Communist Party of China (Revised and Adopted at the 20th National Congress of the Communist Party of China on October 22, 2022)," October 22, 2022, <https://news.cgtn.com/news/files/Full-text-of-Constitution-of-Communist-Party-of-China.pdf> (accessed October 25, 2022), p. 1.

Party members must fulfill the following obligations:

- 1) Conscientiously study Marxism-Leninism, Mao Zedong Thought, Deng Xiaoping Theory, the Theory of Three Represents, the Scientific Outlook on Development, and Xi Jinping Thought on Socialism with Chinese Characteristics for a New Era, study the Party's lines, principles, policies, and resolutions, acquire a fundamental knowledge of the Party, study the history of the Party, improve their general, scientific, legal, and professional knowledge, and work diligently to strengthen their ability to serve the people.
- 2) Strengthen consciousness of the need to maintain political integrity, think in big-picture terms, follow the leadership core, and keep in alignment with the central Party leadership; stay confident in the path, theory, system, and culture of socialism with Chinese characteristics; and uphold Comrade Xi Jinping's core position on the Party Central Committee and in the Party as a whole and uphold the Central Committee's authority and its centralized, unified leadership. Implement the Party's basic line, principles, and policies, take the lead in reform, opening up, and socialist modernization, encourage the people to work hard for economic development and social progress, and play an exemplary and vanguard role in production, work, study, and social activities.<sup>133</sup>

In short, parallel to political transformations in other capitalist countries, Xi Jinping expects total obedience to his one-man rule to stabilize Chinese capitalism, which has been under the twin pressures of the Third Great Depression and rising geopolitical tensions between China and the West. One remarkable aspect of the report is the frequent positive references to China's "traditional culture." As Marxism and communism have become hollow symbols parallel to capitalist restoration, the party-state attempts to draw from China's traditional culture, especially from cultural-ideological sources such as Confucianism. Under Xi's rule, the emphasis on traditional culture has become more prominent. China's traditional culture is not uniform; it contains conflicting elements. However, what Xi refers to as traditional culture bears significant parallels with the cultural policies of many emperors throughout China's imperial history and the counter-revolutionary Guomindang in the 1930s and 1940s. The reference to traditional culture implies the endorsement of a hierarchical culture that preaches the obedience of the poor to the rich, women to men, and subordinates to superiors, with superiors showing mercy to those below them.<sup>134</sup>

As we saw before, on the one hand, Xi attacked the gains of the working class. Still, on the other hand, he attempted to establish hegemony over workers by addressing themes such as fair income distribution, equal opportunities, and combating the illegitimate activities of capitalists. Xi's report presented to Congress paints a similar picture: "We will promote equality of opportunity, increase the incomes of low-income earners, and expand the size of the middle-income group." However, a remark contradicting this statement appears on the next page: "The statutory

<sup>133</sup> "Constitution of the Communist Party of China," p. 18.

<sup>134</sup> On the promotion of traditional Chinese culture in the Xi era, see Zi Yang, "Xi Jinping and China's Traditionalist Restoration," *China Brief*, vol. 17, no. 9, July 7, 2017, pp. 9-13; Zhuoran Li, "The Sixth Plenum and the Rise of Traditional Chinese Culture in Socialist Ideology," November 19, 2021, <https://thediplomat.com/2021/11/the-sixth-plenum-and-the-rise-of-traditional-chinese-culture-in-socialist-ideology/> (accessed November 25, 2022).

retirement age will be gradually raised.”<sup>135</sup> This latter statement shows Xi’s actual stance vis-à-vis the Chinese proletariat.

### *The goal to join the imperialist league*

We discussed above the content of the technological breakthrough China is trying to make to join the imperialist league and the effect of this effort on the competition between Chinese semi-peripheral capitalism and imperialism. In his report, Xi correctly acknowledged that “China’s capacity for scientific and technological innovation is not yet strong enough.” He then sets concrete and short-term goals to make China an imperialist economy:

China’s overall development objectives for the year 2035 are as follows:  
Significantly increase economic strength, scientific and technological capabilities, and composite national strength; substantially grow the per capita GDP to be on par with that of a mid-level developed country.  
Join the ranks of the world’s most innovative countries, with great self-reliance and strength in science and technology.<sup>136</sup>

These objectives are hard to attain. As the hierarchical structure of the world economy has increasingly solidified in the age of imperialism, transitioning from the semi-periphery to the core of the world system is extremely difficult. Putin’s Russia serves as a recent example of this phenomenon. Shortly after assuming the presidency of the Russian Federation, Vladimir Putin set a goal to raise Russia’s per capita income to the level of Portugal’s –which was the poorest country in the European Union at that time– by the end of his second term, i.e., within 12 years. However, despite the economic challenges faced by Portugal because of the European debt crisis in 2009-10, the gap between Russia and Portugal widened rather than narrowed. As of 2021, Portugal’s per capita income is twice that of Russia.<sup>137</sup>

Xi Jinping’s goal of elevating China to a “mid-level developed country” status within a similar 12-year timeframe sounds like Putin’s unfulfilled objectives. On the other hand, when Putin announced his goal, Russia had been grappling with economic stagnation for nearly 40 years. In contrast, Xi set that target for one of the world’s fastest-growing economies, even though it experienced a significant slowdown after the 2008 crisis. Therefore, while Xi’s goal is undeniably challenging, it remains within the realm of possibility, which is precisely why the rivalry between the imperialist bloc and China carries substantial economic and geopolitical risks.

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<sup>135</sup> Xi, “Hold High,” pp. 40-41.

<sup>136</sup> Ibid., p. 19.

<sup>137</sup> Michael Roberts, “Russia Under Putin,” August 15, 2022, <https://thenextrecession.wordpress.com/2022/08/15/russia-under-putin/> (accessed October 1, 2022).

## **The protest wave of November 2022 and the future of the Chinese Revolution: Results and prospects**

In *Results and Prospects*, written shortly after Russia's 1905 Revolution, Leon Trotsky made ambitious predictions regarding the world revolution based on his theory of uneven and combined development. According to Trotsky, the level of development of capitalism was not directly proportional to the proletariat's consciousness. In advanced capitalist countries like the United States and the United Kingdom, despite their numerical superiority, proletarians could not break free from bourgeois hegemony. In late-tsarist Russia, where feudal and capitalist structures intertwined and industry was still underdeveloped, the bourgeoisie failed to establish hegemony. At the same time, the Russian proletariat, despite being numerically weak, achieved a high level of class consciousness. Trotsky argued that it was not possible for the Russian bourgeoisie, heavily dependent on large landowners and the Tsarist regime, to carry out land reform or grant the right to self-determination to oppressed nations under the empire. The proletariat could pave the way to power by exploiting these political weaknesses of the bourgeoisie. Based on this analysis, Trotsky accurately foresaw that the proletariat would come to power in Russia before the West. In *The Permanent Revolution*, written in 1929, Trotsky applied the law of uneven and combined development to colonial and semi-colonial countries and concluded that revolutionary consequences similar to those in Russia would occur in societies shaken by the contradictions of transitioning from feudalism to capitalism. This prediction was confirmed by the chain of revolutions extending from Eastern Europe to China and Cuba after the Second World War.<sup>138</sup>

The conditions in present-day China significantly differ from when Trotsky made the abovementioned predictions. It is not the painful contradictions of the transition from feudalism to capitalism but rather the internal class contradictions generated by Chinese capitalism and the contradictions with the existing imperialist powers due to the PRC's goal of becoming imperialist that are on the agenda. Despite this difference, the law of uneven and combined development continues to operate in China. Although capitalist restoration has been completed, the economic and political dynamics it has brought forth seem to pose significant obstacles to bourgeois hegemony in China. A Chinese revolutionary Marxist using the pseudonym Lao Xie succinctly pointed to this in an interview conducted with him in 2017:

I think the main thing is not the size of China's working class or the number of strikes. In the early twentieth century, there were many more industrial workers and strikes in the US than in Russia, yet it was only in Russia that a social revolution took place. I think China's value lies in its situation where multiple factors are in play at the same time. Its various social forces and classes are still taking shape and the boundaries between them, the rules for distributing interests and their understandings of one another are all still in flux. The bourgeois state and its

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<sup>138</sup> Leon Trotsky, *The Permanent Revolution & Results and Prospects*, <https://www.marxists.org/archive/trotsky/1931/tpr/index.htm> (accessed August 29, 2023).

ideology, including “civil society,” are still just being built.<sup>139</sup>

Lao Xie describes the distinctive features of the Xi era in the context of this uneven and combined development:

This is how I would summarize the political situation over the past four years: Chairman Xi has begun to carry out state-building (建设国家). Prior to this, the Chinese government was like a protracted provisional government, from Deng’s market reforms all the way up until Chairman Hu stepped down [in 2012]. The task of state-building kept getting postponed. A sort of bourgeois state gradually came into being, but it was like the frame of a house: it had a roof, but there was no glass in the windows, and the interior wasn’t furnished at all. People could live inside, they could even invite some guests over, but.... If you say “incomplete bourgeois state,” that could be misunderstood as meaning the bourgeoisie hadn’t formed yet. It had formed, but especially on the spiritual level, its tentacles hadn’t yet penetrated deep into the minds of the people. It hadn’t yet established a complete set of rules and regulations for long-term planning. Chairman Xi is finally attempting to build a long-term state. In this sense, I think you could say that Chairman Xi is a founding father (国父). He’s trying to build something that could last for hundreds of years.<sup>140</sup>

Xi’s policies explored in this paper aim precisely at such a quest for stability. However, the internal and external contradictions created by the Third Great Depression made his job difficult. These contradictions offer significant opportunities to the Chinese proletariat, which rose in the early 2000s:

The group at the core of China’s ruling class has clearly expressed its intention to continue monopolizing state power into the foreseeable future, determining that its contradictions with other fractions of the class cannot be smoothly worked out through the principles of “political pluralism.” At the same time, this group is actively attempting to learn from the old capitalist world. And like the rest of that world, China is entering a period of retreat from “globalization.” International interests are being reorganized. All these factors are generating multiple levels of internal tensions across Chinese society. Society has not yet settled into a condition where everything follows rules that people regard as natural and unassailable. I think this is the reason that China has a special, perhaps unique value for the class struggle. If it were just a matter of the number of workers or strikes, then India, Indonesia or Vietnam might be more important, but no other country has quite this combination of factors at play as we see in China today.[...] There’s definitely an opportunity. In Chinese we say “the wind and water flow in one direction for a while, and then they switch” (风水轮流转). Capitalist rule, after having undergone 25 years of unprecedented stability, is clearly beginning to waver (动摇).<sup>141</sup>

Class struggles and mass demonstrations that occurred shortly before and right

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139 “A State Adequate to the Task,” p. 285. The main issue is not whether the information provided in Lao Xie’s comparison of the USA and Russia is accurate. His criticism of a mechanistic understanding of revolutionary politics and emphasis on uneven and combined development is noteworthy.

140 Ibid., pp. 330-331.

141 Ibid., p. 286, 350.

after the 20<sup>th</sup> Congress vividly confirmed Lao Xie's observations. These struggles reveal a complex picture where the issues we have discussed throughout this article (such as semi-peripheral character of the Chinese capitalism, increasing contradictions between capital and labor during the Third Great Depression, the escalating Uyghur national question, and the rising state violence during Xi's era) are intertwined. As explained above, China's "zero COVID" policy based on lockdowns protected the country from a significant public health disaster and economic devastation throughout 2020 and early 2021. However, it was clear that this strategy would fail if not supported by a robust vaccination program.

Xi's administration implemented an import-substitution policy, aiming to allow local companies to produce mRNA vaccines instead of permitting the import of mRNA vaccines. Nevertheless, due to China's scientific and technological backwardness compared to the West, relying on import substitution amid a public health crisis like the pandemic was a considerable gamble. Xi planned to manage the process with lockdowns until domestically produced mRNA vaccines were available and then present it as a victory against the West. However, his project crashed against the wall of China's semi-peripheral character. As I noted, the first locally produced mRNA vaccine was approved after the end of the pandemic. In other words, Xi lost the vaccine gamble. This failure compelled the state to impose increasingly oppressive measures to enforce prolonged lockdowns, exhausting the people and provoking dissatisfaction and resistance.

The failure of China's pandemic management, from an early success story to a massive disappointment, deeply affected other significant issues discussed in this article. Firstly, as the negative impact of lockdowns on the economy increased, the state prioritized keeping factories open (especially in export-oriented sectors). However, after each reopening, COVID-19 cases surged due to inadequate working and living conditions in factories. This situation forced the seemingly suppressed working class to struggle for survival. Capitalists announced significant wage raises to attract the workers back into factories. Yet, capital's failure to fulfill such promises due to the ongoing economic bottlenecks intensified workers' struggles. The collapse of the pandemic policy aggravated other problems discussed in this article. The "zero COVID" policy was always applied more strictly in the Xinjiang Uyghur Autonomous Region, intertwined with national repression. On the other hand, the increasing suppression of already limited academic freedoms and student organizations during the Xi era was causing significant unrest among a broad spectrum of the youth, particularly university students, before the pandemic. The prolonged pandemic lockdowns, including in schools, made all these issues ripe for ignition with just a spark.

The industrial proletariat lit the first spark that brought the Chinese people to the streets. As known, Foxconn, a Taiwanese-owned corporation, manufactures Apple-designed products in giant factories in China that resemble small cities with hundreds of thousands of workers employed. When production costs increased due to worker struggles in factories in Guangdong province, Foxconn shifted its production to regions in the central and western parts of the country where wages were lower. However, workers' struggles also occurred in these regions. Approximately 200,000

workers were employed at the Foxconn factory in Zhengzhou city in Henan province, known as the “iPhone City.” Around 100,000 workers, unhappy with frequent exposure to quarantines and poor living conditions during quarantines, left the factory in mass numbers starting in mid-October 2022. Concerned about production coming to a halt, the Chinese state, providing a striking example of its state capitalist character, initially sent lower-level party-state cadres and officials to work at the Foxconn factory.

However, this practice did not solve the labor shortage problem. Foxconn management then offered significant wage increases and promised to improve housing conditions, which enabled the company to hire around 100,000 new workers. After production resumed, Foxconn started to backtrack. Contrary to promises, the coexistence and housing of old and new workers in the factory led to the continuation of the COVID-19 outbreak and lockdowns. The management also began to delay paying the promised wages and benefits, which workers were eager to receive before the Chinese New Year. On November 22, 2022, the accumulated anger of Foxconn workers erupted. Unable to deal with the workers, the management first deployed the security guards. After workers repelled them, the police intervened. The workers clashed with the police and security personnel for three days. During the clashes, the workers destroyed the factory’s security cabins and COVID-19 test sites. The struggle ended successfully, as Foxconn management agreed to provide even higher wages and benefits and deposit them directly into workers’ bank accounts.<sup>142</sup> The successful struggle at Foxconn was the first significant response to Xi’s anti-labor policies.



**Foxconn workers clashed with security personnel wearing white isolation suits.**

<sup>142</sup> “[深度分析] 郑州富士康工人的阶级斗争 (一),” November 25, 2022, <https://telegra.ph/Jinzhao-Deep-in-Analysis-The-Class-Struggle-of-Foxconn-Workers-in-Zhengzhou-part-I-11-25> (accessed November 28, 2022).

While the successful struggle of the Foxconn workers lit the fire, the tipping point that triggered the wave of unrest after the 20<sup>th</sup> Congress occurred in Xinjiang. On November 24, a fire broke out in Urumqi, the capital of the Xinjiang Uyghur Autonomous Region, killing ten people. It was reported that due to quarantine measures, the building entrance was closed; hence, the residents could not leave the building. Also, fire engines couldn't reach the area in time due to lockdown-related barricades on the roads. The day after the tragedy, during a press conference, an official blamed the apartment residents for the incident, leading to widespread anger.<sup>143</sup>

Protests were held in Urumqi on November 25, and starting on November 26, thousands of people took to the streets nationwide. Mass demonstrations were organized on over 50 university campuses.<sup>144</sup> These demonstrations targeted Xi's administration for its failure, recklessness, and oppressive actions in managing the pandemic. In some places, slogans directed against the regime were chanted. For instance, on the evening of November 27, in Beijing, around 100 people marched towards Tiananmen Square, chanting slogans such as "We want universal values," "We want freedom, equality, democracy, rule of law," "We don't want dictatorship," "We don't want personality cult."<sup>145</sup> On the same night in Shanghai, protesters chanted slogans like "No dictatorship, we want democracy. We don't need a dictator we want voting rights."<sup>146</sup>

143 Manya Koetse, "The 11.24 Urumqi Fire: Mourning and Anger at Lives Lost in Apartment Building Inferno," November 25, 2022, <https://www.whatsonweibo.com/the-11-24-urumqi-fire-mourning-and-anger-at-lives-lost-in-apartment-building-inferno/> (accessed November 28, 2022).

144 <https://twitter.com/vivianwubeijing/status/1596756273730502657> (accessed November 28, 2022).

145 <https://twitter.com/SiminaMistreanu/status/1596912559399268353> (accessed November 28, 2022).

146 <https://twitter.com/vivianwubeijing/status/1596610080350535680> (accessed November 28, 2022).



**One participant in the demonstrations in Shanghai displayed a Mao poster (November 27, 2022)**

Panicked by the protest wave and its potential to spread further and take a regime-challenging direction, the Chinese government hastily declared victory over COVID-19. It ended all “zero COVID” measures, such as mass testing and lockdowns. When defending “zero COVID,” Chinese official media stressed the value of saving lives and avoiding severe long-term public health risks such as “long COVID.” After Xi’s panic-ridden U-turn, the official media backtracked from these arguments and started disseminating misleading claims belittling the negative consequences of the new policy. Despite the government’s censorship of COVID-related data, the available evidence shows that Xi’s U-turn was a recipe for a public health disaster. Although Chinese official statistics claimed that the country had only 85,000 COVID-19 deaths as of February 2023,<sup>147</sup> the available evidence shows that the actual death toll was much higher. Satellite images showed that crematoriums were overcrowded across the country during the weeks following the U-turn.<sup>148</sup> In July 2023, the Zhejiang provincial government reported that the number of cremations increased by 73% during the first quarter of the year. This report, which attracted significant public attention, demolished the credibility of the central government’s claim that the end of “zero COVID” was an orderly process that did not harm public health. The Zhejiang government soon retracted the report.<sup>149</sup>

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147 James Glanz, Mara Hvistendahl, and Agnes Chang, “How Deadly Was China’s Covid Wave?,” February 15, 2023, <https://www.nytimes.com/interactive/2023/02/15/world/asia/china-covid-death-estimates.html> (accessed August 27, 2023).

148 Sophie Jeong and Wayne Chang, “Satellite images capture crowding at China’s crematoriums and funeral homes as Covid surge continues,” January 11, 2023, <https://edition.cnn.com/2023/01/10/asia/china-funeral-homes-imagery-covid-intl/index.html> (accessed August 27, 2023).

149 Ryan McMorro and Nian Liu, “China deletes Covid-19 death data,” July 18, 2023, <https://>

According to a recent study, “an estimated 1.87 million excess deaths occurred among individuals 30 years and older” during the first two months after the end of the “zero COVID” policy.<sup>150</sup>

A closer look at the November 2022 unrest wave yields several noteworthy conclusions. First, despite the persistence of the Han majority’s chauvinistic prejudices towards Uyghurs, the fact that an injustice suffered by Uyghurs has led to nationwide protests is a significant development. This situation indicates that overcoming the distrust between the two nations might be possible within the process of struggle in the long term. Secondly, similar to the 1989 Tiananmen Square protests, the demonstrations in November 2022 involved people from various social classes and political orientations. Notably, individuals with both liberal and socialist tendencies are participating in the protests. Mao posters were displayed during the demonstrations in Shanghai. Just like in Tiananmen 1989,<sup>151</sup> the International anthem was sung during the demonstrations in Shanghai, Peking University, and Chengdu.<sup>152</sup> In a protest held nearby the Liangma Bridge in Beijing, when someone mentioned “external forces,” another person in the crowd responded, “Are you referring to external forces like Marx and Engels? Did foreign forces also cause the fire in Xinjiang?”<sup>153</sup>

Finally, and more importantly, demonstrations in November 2022 revealed that Xi’s decade-long efforts to build and solidify his dictatorship, which he eagerly sought to confirm as an absolute victory since the 20<sup>th</sup> Congress, lack a strong enough social foundation. Xi’s abrupt U-turn from “zero COVID” right after the mass demonstrations exposed the fragility of his rule.

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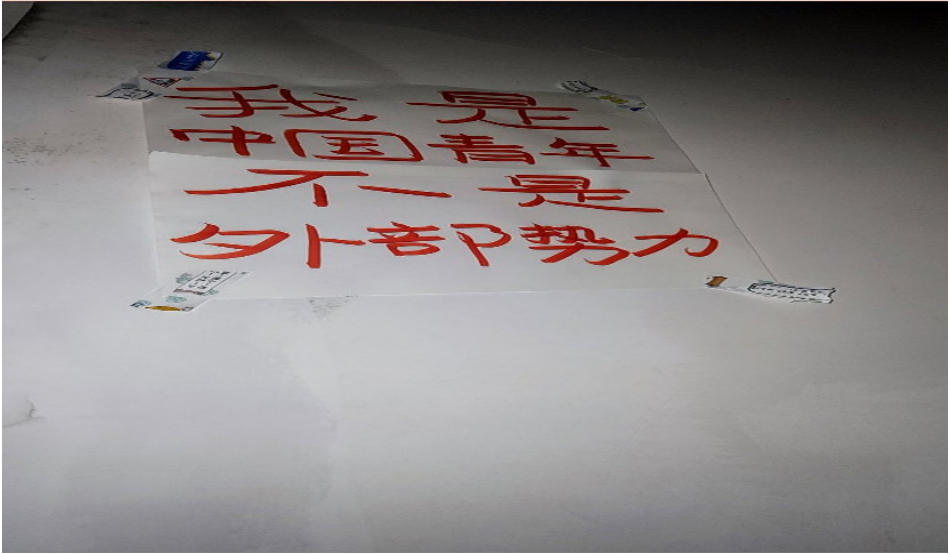
on.ft.com/44srNyb (accessed August 27, 2023).

150 Hong Xiao, Zhicheng Wang, Fang Liu, and Joseph M. Unger, “Excess All-Cause Mortality in China After Ending the Zero COVID Policy,” *JAMA Network Open*, vol: 6, no: 8, 2023, doi:10.1001/jamanetworkopen.2023.30877.

151 <https://www.abc.net.au/news/2019-06-03/chinese-protesters-sing-the-communist-anthem/11167590> (accessed November 28, 2022).

152 <https://twitter.com/Gohahwei1/status/1596862131433254912> (accessed November 28, 2022), <https://twitter.com/EliDFriedman/status/1596612696107286528> (accessed November 28, 2022), <https://twitter.com/EliDFriedman/status/1596900050747019264> (accessed November 28, 2022).

153 <https://twitter.com/renminwansui5/status/1597081723887824896> (accessed November 28, 2022).



**The banner at the Ningbo Institute of Technology says: “I am a young Chinese, not an external force.”**

When considering the unrest wave of November 2022 along with Lao Xie’s observations mentioned above, it becomes evident that China remains one of the critical fronts of the world revolution as in the past century. A new Chinese Revolution can help trigger a new wave of world revolution. Building a new revolutionary party in China and a new international worldwide is necessary to initiate this wave. One of the prerequisites for such a direction is to rely on the strength of the working class instead of seeking alliances within the Chinese Communist Party (CCP). Rejecting Han chauvinism is the only way to transform the Uyghurs, Tibetans, and other oppressed nations into allies of the revolution rather than pawns of reactionary forces. Finally, understanding the non-imperialist, semi-peripheral nature of Chinese capitalism and taking an unequivocal stance against the pro-imperialist, left-liberal “Orange Revolution” camp within China and the rest of the world are essential conditions for revolutionary politics.

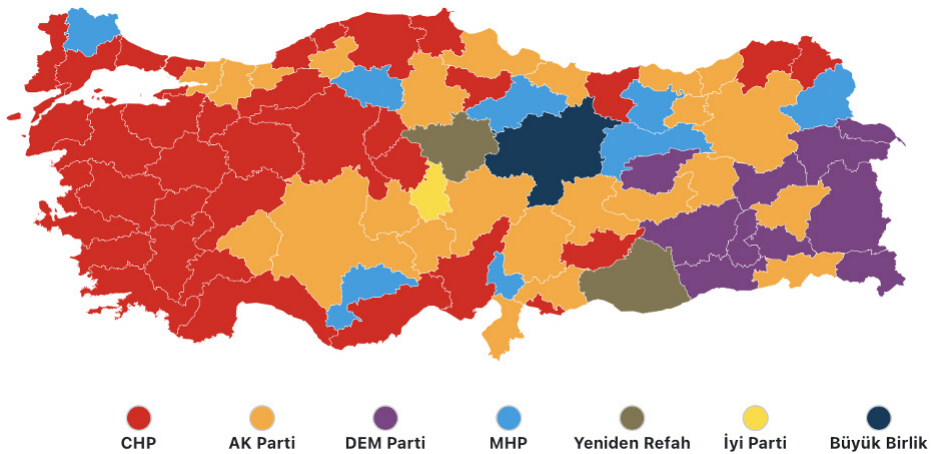
# March 2024 Municipal Elections from a Class Politics Perspective<sup>1</sup>

Levent Dölek

The March 31 local elections (2024) resulted in a major defeat for the Justice and Development Party (*Adalet ve Kalkınma Partisi*, AKP). The metropolitan municipalities held by AKP decreased from 15 to 12 from 2019 to 2024. The total loss in municipalities (35 percent loss, from 776 to 507) was much higher. In this election, AKP votes fell to the historic lowest point of 32.42 percent. In contrast, the Republican People's Party (*Cumhuriyet Halk Partisi*, CHP) looks triumphant. The main criterion of this victory is again in the mayoralties won. CHP increased the metropolitan cities it won from 2019 to 2024 from 11 to 14; in total, the number of CHP's municipalities increased from 263 to 420. CHP achieved first-party status in terms of vote share, receiving 34.47 percent of the votes. The dominant color on the map of Turkey reflecting the election results, became red, which historically represents CHP.

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<sup>1</sup> This article was previously published in Turkish in the 57th issue of *Devrimci Marksizm* journal (Summer 2024). For its yearly English edition, *Revolutionary Marxism*, certain sections have been cut or summarized, some explanations have been added for readers who are not familiar with the politics of Turkey, some political developments over the past period have been discussed, and the conclusion has been updated and rewritten accordingly.



A crucial data point that stands out in the election was the low participation rate. The participation rate of 78.55 percent was 6 points lower than the participation rate of 84.66 percent in the previous local elections held in 2019. 13 million people did not go to the polls, and 4.5 million invalid votes were cast. There was also an increase in invalid votes in this election. This “reaction party”, expressed in the increase in the groups that did not go to the polls and cast invalid votes, whether compared to the previous local election (6.6 point increase) or general elections held 10 months ago (10.6 percent increase), is in the position of the third party following AKP and CHP, and is ahead of the 6.1 percent vote of the YRP, which is led by Fatih Erbakan, the son of Necmettin Erbakan, the historical leader of the political Islamist movement in Turkey. It is a visible and tangible fact that not going to the polls and casting invalid votes is a reaction to the government. Erdoğan himself said that the will of 16 million voters, including invalid votes, was not reflected in the ballot box and stated that the low participation rate was one of the main reasons for the decline in his party’s votes.

## The fascist threat continues

In the May 2023 elections, fascist and fascist-origin parties<sup>2</sup> reached a total of 12.6 million votes and a rate of 23.2 percent. These high voting rates led to widespread comments that “the winners of this election were the nationalists.” We took this

<sup>2</sup> These parties consist of the Nationalist Action Party (*Milliyetçi Hareket Partisi*, MHP), which has historically formed the main body of the fascist movement in Turkey, founded by Alparslan Türkeş and known internationally as “Grey Wolves”; Great Unity Party (*Büyük Birlik Partisi*, BBP), which separated from MHP with more Islamist emphasis under the leadership of Muhsin Yazıcıoğlu after the military coup on September 12, 1980; Good Party (*İYİ Parti*), which separated from MHP under the leadership of Meral Akşener after the rapprochement of MHP with AKP in 2014 and Ümit Özdağ’s Victory Party (*Zafer Partisi*), which he founded after leaving the İYİ Party in 2021, and is modeled on the proto-fascist parties in Europe that center on hostility towards immigrants.

peak very seriously and described it not simply as a rise of nationalism but as a “fascist threat”. A completely different picture emerged in terms of vote rates in the May 2024 elections. According to the votes given directly to the parties for the Metropolitan Municipality Assemblies and Provincial General Assemblies, MHP received 6.58 percent (3 million votes); İyi Party 4.6 percent (2.1 million votes); Victory Party 2.44 percent (1.2 million votes); BBP remained at 0.4 percent (200 thousand votes) and the vote share of fascist parties dropped to a total of 14 percent (6.5 million votes).

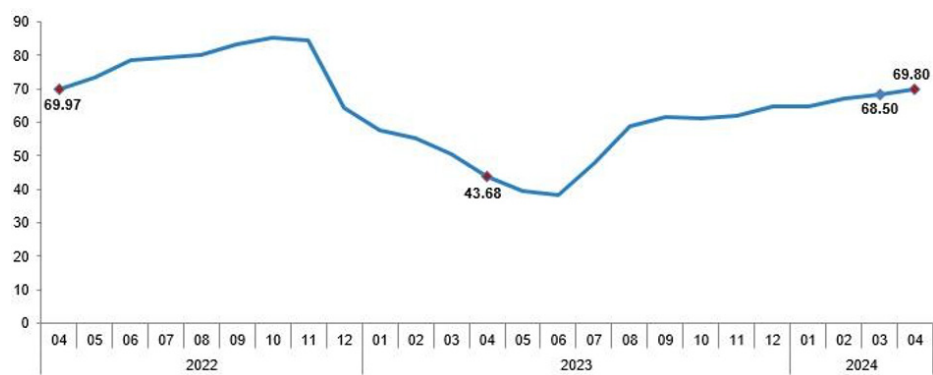
It would be reckless to look at this picture and think that the fascist danger has passed with this election. The fascist danger cannot be seen as limited to voting rates. The international economic and social conjuncture that laid the groundwork for the rise of fascism (Third Great Depression, deglobalization, the immigration question, the possibility of regional wars or a world war, etc.) continues. Some features of the conjuncture in Turkey mingle with and reinforce this global conjuncture. The dynamics of economic crisis push down the classical petty bourgeoisie, which forms the mass base of fascism. Turkey is the country where the immigrant problem is experienced at the most striking level in quantitative terms in the world. As the bourgeoisie attacks the working class under the pressure of the economic crisis, the possibility of needing harsher methods to atomize the class increases, and the expansionist ambitions of the bourgeoisie strengthen the tendency towards militarism. All these tendencies are most intensely reflected in the ranks of the fascist movement. The institutions that form the backbone of the military wing of the semi-military regime (especially the police and gendarmerie) are treated as if they were the natural quota of fascist parties.

Most importantly, AKP and CHP, which constitute the central forces of both the government and the opposition, often borrow the arguments of the fascist movement in their political discourses. For example, Erdoğan has been using the Rabia sign (showing four fingers), which he uses in reference to the Muslim Brotherhood movement, in rallies together with the fascistic slogan “one nation, one flag, one homeland, one state” for a long time. CHP, on the other hand, has begun to place anti-immigrant sentiment at the center of its politics, and has included many candidates of fascist origin or using fascist rhetoric when choosing its parliamentary and mayoral candidates. Therefore, although the vote share of fascist parties has decreased, fascism’s sphere of influence does not shrink, and perhaps even expands.

## **Municipal elections and the impact of the economy: What changed in the economic sphere between May 2023 and March 2024**

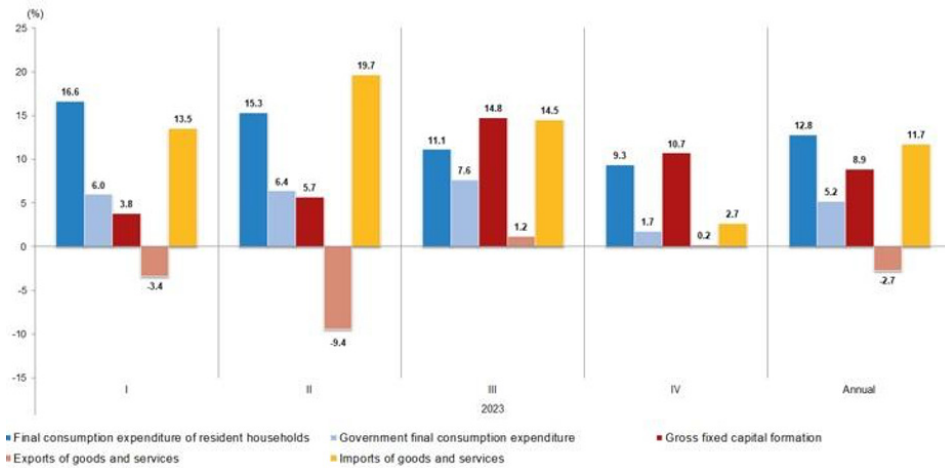
One of the main themes of politics in Turkey in recent years has been the economic downturn. In Turkish politics, former center-right leader Süleyman Demirel’s words, “There is no government that an empty pot cannot overthrow”, are frequently quoted. However, despite the negative trend in the economy, Erdoğan was the winner in the two-round presidential election held in May 2023. The

parliamentary majority clearly switched to the People’s Alliance. In May 2023, official inflation rate dropped to 40 percent, albeit due to the base effect (ENAG figure was 109 percent), and in March 2024, when local elections were held, official inflation was measured as 68.5 percent<sup>3</sup> (ENAG figure were 124 percent). Inflation is a phenomenon that increases the cost of living and impoverishes large masses of people. Of course, high inflation has a political cost to the current political power. It is clear that higher inflation will come at a higher cost.



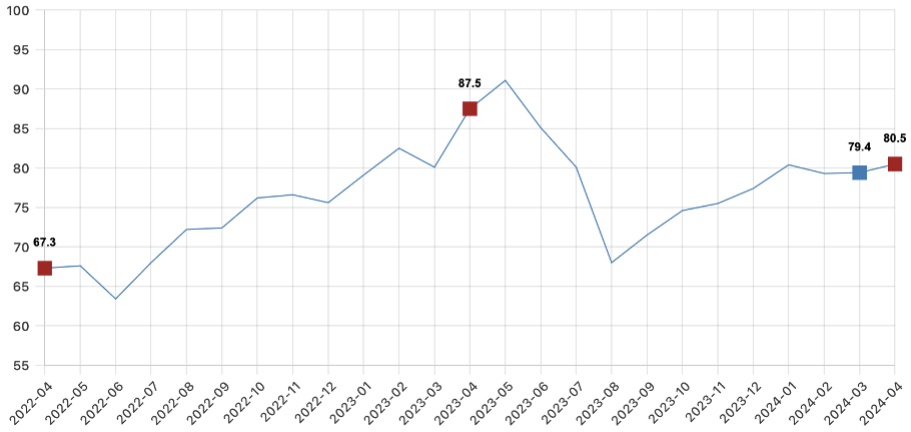
The devastating effect of high unemployment on the masses comes at a much higher political price for the governments compared to high inflation. We can explain this as follows. Inflation shows us the rate of increase in prices. However, during inflationary periods, wages may also increase. Moreover, these increases occur at a higher rate than in periods when inflation is low. As a result, since the rate of increase in prices is higher than the rate of increase in income, purchasing power decreases and impoverishment occurs, but during each wage increase period, employees experience a temporary increase in purchasing power. This phenomenon is called the “money illusion”. This plays a soothing role in the social tension created by inflation. As we experienced before May 2023, public banks can increase their credit volume, leading to an increase in household consumption. In an inflationary environment, people who think that goods and services will become more expensive in the future tend to increase their consumption even more. As a result, when household consumption increases—even if driven by the illusion of wealth and borrowing—the societal stress caused by the high cost of living can be alleviated to some extent.

3 TÜİK, <https://data.tuik.gov.tr/Bulten/Index?p=Consumer-Price-Index-April-2024-53614>



Analyzed from this perspective, we see that household consumption was increasing rapidly in the run-up to the May 2023 elections, and that in the first two quarters of 2023, household consumption was the engine of economic growth with high growth rates of 16.6 percent and 15.3 percent, respectively. After the general elections, the growth rate of household consumption decreased to 9.3 percent by the end of 2023. We can most clearly observe the money illusion the election economy created on the society in the Consumer Confidence Index figures. The consumer confidence index, calculated from the results of the consumer trend survey conducted in cooperation with the Turkish Statistical Institute and the Central Bank of the Republic of Turkey, reached its peak at 91.1 in May 2023, at the end of a long increasing trend. The consumer confidence index, which entered a downward trend immediately after the May 2023 elections, dropped to 79.4 in March 2024. These figures help explain why the public reacted relatively mildly to the economic downturn in May 2023. As the May elections entered their final phase, the front of despotism launched an intense wave of chauvinistic propaganda. This included portraying Kemal Kılıçdaroğlu, then the CHP chair, as the candidate of Kandil—referring to the mountainous region in Iraq where the armed militants of the Kurdistan Workers' Party (*Partiya Karkerên Kurdistan*, PKK) are based—through fake videos and social media manipulation. If this attack softened the reaction based on economic reasons in the AKP-MHP voter base and achieved a certain consolidation, the main reason for this was the continuation of the increase in household consumption despite inflation.

Consumer confidence index, April 2024



But unemployment is different. A completely different picture emerges for an unemployed person - especially if it takes longer to find a job at the same income level again. When debts and rents cannot be paid, economic, social and psychological destruction wrecks the family. The anger and reaction this destruction triggers is much harsher. The political cost of a general increase in unemployment level to the government in office is much heavier. For this very reason, when we say that governments practice “electoral economics”, we generally understand the effort to prioritize and control growth and employment at the expense of high inflation and budget deficits. Although the narrowly defined unemployment, which was 9.5 percent in May 2023, seems to have decreased to 8.7 percent in March 2024, broadly defined and real unemployment rate (which includes the unemployed who have given up looking for a job, those working in temporary jobs, etc., the idle workforce) increased from 22.5 percent in May 2023 to 24.5 percent in March 2024.<sup>4</sup> All this data provides us with important grounds as to why the masses made the government pay a greater political price in March 2024 compared to May 2023. At the very least, it shows that the economic data in question is quite decisive in increasing the political price paid by Tayyip Erdoğan’s People’s Alliance (*Cumhur İttifakı*).

4 TÜİK, <https://data.tuik.gov.tr/Bulten/Index?p=Labour-Force-Statistics-February-2024-53509xzkılç√÷üm90ö>

Seasonally adjusted supplementary labour force indicators, February 2022 - February 2024

(%)



However, we should point out the following here. The economy was in an extremely dire condition in both May 2023 and March 2024, due to its structural features. The deterioration of the macroeconomic indicators mentioned above between the two elections is not structural but superficial. The crisis dynamics of Turkish capitalism arise from the structural features of a capitalist economy dependent on imperialism, within the global conjuncture determined by the Third Great Depression of world capitalism. The data we are talking about are the surface manifestations of these underlying dynamics. It can be said that the Turkish economy has cancer. What we are talking about are some blood values that affect the body's daily energy, vitality or state of weakness and exhaustion. Imagine that these values are corrected with drugs or supplements administered by the doctor externally, the fever is reduced with antipyretics, etc. However, none of these has any healing effect on cancer cells that have invaded the body. On the contrary, the cancer progresses during this period.

## Why Erdoğan did not (or could not) resort to electoral economics in the municipal elections?

We can now clearly see macroeconomic data showing “the state and course of the economy” in popular language and their impact on the elections. However, there still remains a question to be answered. Why didn't Erdoğan and his allies implement the economic policy that won them elections in May 2023 in the local elections in March 2024? Why was Mehmet Şimşek given the helm of the economy

with the slogan “return to rational policies” right after the elections? The story so far shows that Erdoğan has spent all the ammunition he has for the May 2023 elections. It should not be concluded from this that Erdoğan could not give retirees a raise even if he wanted to. Not giving a rise to retirees was a class-based choice. If he was sincere, he would have checked out the interest payments that make up more than half of the budget deficit for the resources necessary not only for pensioners but also for education, health and other public services. Of course, Erdoğan could not have such a class preference. The only factor that could motivate him in this direction would have been political. However, politically, Erdoğan had to strategically focus on keeping the central power in his hands.

The economic ammunition Erdoğan could use for the elections was limited. Imperialist financial centers such as London, Frankfurt and New York, demanding high interest rates and structural reform, cut off the hot money flows. In an economic environment where external resources have been cut, both the state of the Central Bank reserves and the increasing budget deficit prevented Erdoğan from pursuing electoral economics that would cover both elections. It was a necessary strategic choice for Erdoğan to consume all the ammunition he had in May 2023, knowing that it would put local elections at risk. We can guess how difficult this choice was for Erdoğan, who knows very well the importance of local governments, especially Istanbul, in his rise to power and consolidation of his power. Erdoğan thought that he could manage a possible local election defeat by holding onto the central government, and now he is doing exactly that. But it is clear that the opposite would not be possible.

### **Great strides for compromise among the bourgeois ranks: “Four year-period without elections” is a political program, not a prediction**

While Erdoğan was trying to heal the wounds of the defeat in the local elections by holding onto the central power, Özgür Özel refrained from speaking in a triumphant tone and emphasizing his own victory and the AKP’s defeat, both on the election night and afterwards. This should not be seen as a mere show of humility. Under Özgür Özel’s soft tone were the class interests of the bourgeoisie. These class interests dictated that Erdoğan and his government, who were already carrying out the strategic attack of capital with the Medium-Term Program (*Orta Vadeli Program*, OVP) and plotting a foreign policy course that was even more clearly imperialist-aligned than before, not be forced or pressured. Özgür Özel continued to follow a line loyal to these interests after the elections. The most concrete expression of this line is that Özgür Özel did not demand a new election, stating that “there are 4 years without elections”, right after the municipal elections, when Erdoğan and the AKP were at their most politically fragile. Özgür Özel presented this as a responsibility towards the AKP and MHP voters from whom he had received votes. However, the actual reason is different. Since the May 2023 elections, CHP has been defending the austerity program with concepts such as rational policies, structural reform,

central bank independence, and a reliable investment environment. In fact, Mehmet Şimşek's Medium-Term Program is almost identical to the economic program of the Nation Alliance led by CHP, point by point. As a matter of fact, if Kılıçdaroğlu had been elected President, he would have handed over the economy to Ali Babacan (previously Erdoğan's state minister in charge of the economy and foreign affairs minister). Erdoğan won and put Mehmet Şimşek at the helm.

Therefore, we can say that the statement of a 4-year period without elections is not a prediction but a political program. This program is the program of an unofficial alliance in line with the interests of the bourgeoisie. This alliance is unofficial, but it is not an unnamed alliance. Its name is "Turkey alliance". Both Erdoğan and Özel, as well as in the discourses of different parties and leaders from the ruling and opposition sides, have mentioned the so-called "Turkey alliance" many times in various times and contexts. Özgür Özel puts forward this concept with a kind of "constructive opposition" approach that is careful not to pressure the government, stays away from early elections, and blocks any demands that may come in this direction. This aspect of the matter reflects the general interests, demands and expectations of the bourgeoisie. But Özel does not stop here. By saying "We are Turkey's main opposition party, but abroad, we are Turkey's party first", he gave a guarantee that he will act in accordance with the priorities and sensitivities of the semi-military regime in specific topics like the Kurdish and Cyprus questions.

Hence, Özel's position was tested in two cases in the first two years following the local elections. First was the Öcalan opening that Bahçeli started, the other was Turkey's foreign policy during the fall of Asad and the HTS's seizure of power in Syria. Özel followed a policy in accordance with the government.

## **The reactionary character of the search for a great compromise**

The grounds for this compromise are clear in Turkey. In foreign policy, the expansion of Turkish monopoly capital into the Arab world, the Muslim world, and Africa, as well as access to Asian markets on the one hand, and the desire not to break ties with the European Union—its largest trade partner—on the other, are shared goals. In fact, advancing integration with Europe by updating the customs union agreement, reducing foreign dependency in energy, and ensuring energy security are common objectives for all wings of the Turkish bourgeoisie. While the European Union stands out as a strategic priority for the Westernist-secular bourgeoisie, the Islamist bourgeoisie attaches more importance to opening up to the Arab and Muslim world, where it has a comparative advantage. In the same vein, while the Westernist-secular bourgeoisie is ready to sacrifice more for its goal of integration into the EU, the Islamist bourgeoisie can act more reckless and damage its relations with Europe, the USA and the West as it moves towards the east, where it has a competitive advantage. But at the end of the day, these contradictions are secondary. When relations with the EU approach the breaking point, we see that the Islamist bourgeoisie always hits the brakes. On the other hand, the Westernist and secular sensibilities of the Turkish Industry and Business Association (*Türk*

*Sanayicileri ve İş İnsanları Derneği*, TÜSİAD) can soften considerably in the face of Islamism and pan-Sunnism that provide access to energy resources and markets. TÜSİAD is an organic element of the imperialist yoke established over Turkey through NATO and the EU. It is the domestic partner of imperialist finance capital. However, this does not prevent TÜSİAD capital from pursuing investments in Russia, the Gulf countries, or Africa. TÜSİAD positions itself as a key partner in China's Belt and Road Initiative, and these interests make the inclination to remain within the NATO circle—framed by the current government as a “balance policy”—and to pursue an autonomous foreign policy without severing ties with the imperialist West, particularly appealing to the Western-oriented secular bourgeoisie.

The pro-western-secular bourgeoisie is more likely to make concessions in Cyprus in order to integrate with the EU. Although the Islamist bourgeoisie does not abandon the rhetoric of “Mujahid Erbakan, the conqueror of Cyprus”, it can be extremely eager to jump on the bandwagon of European imperialism, as we have seen in the past during the Annan Plan process. On the Kurdish issue, the Westernist-secular bourgeoisie can support “opening” policies under the umbrella of the EU Charter of Local Governments Autonomy, while the Islamist bourgeoisie can support “opening” policies on the basis of a Sunni Islamic brotherhood from an ummah-oriented perspective. On the other hand, in the final analysis, all wings of the bourgeoisie have colonial interests in the island of Cyprus and the Kurdish regions. The bourgeoisie thinks that its colonial interests in these geographies are guaranteed by the military presence of the Turkish Armed Forces. For this reason, even the seemingly most liberal wings of the bourgeoisie can quickly switch to the “survival” discourse that helps mobilize the nation to protect their colonial interests. In short, the basis for compromise is the class interests of the bourgeoisie.

## **The compromise need not be realized peacefully**

We are talking about the tendencies of compromise within the bourgeoisie and the developments in this direction. This compromise has not yet been achieved. Opposing tendencies may manifest themselves in a much harsher way than in the past, under all kinds of economic, political and military failures, tensions and crises. Moreover, the compromise itself does not have to come about peacefully. In other words, there is a dialectical unity of violence and dialogue in politics. Threat is a method of dialogue in itself. From this perspective, it can be easily seen that the first responses to Özgür Özel's gentlemanly show that started on election night were not peaceful at all. Erdoğan told the CHP that they should not get into a fuss just because they won in the local elections: “Poor people who think they will rule Turkey!”, he reminded them in a not-so-kind way. While Erdoğan is uttering these words, Bahçeli is showing the stick of the semi-military regime by saying “this country was not established through the ballot box”. Finally, the front of despotism quickly put its words into action and showed that there is no such thing as municipal power, that municipalities are subject to the central power, and that the state is ultimately based on the armed coercive apparatus and its extension, the

courts, by arresting CHP's fledgling Kepez mayor, Mesut Kocagöz. After this first step, a trustee was appointed to the Esenyurt municipality, which was taken over from the AKP by the alliance of CHP and HDP, and the CHP (former HDP) mayor Ahmet Özer was arrested. This wave of repression continued with the arrest of Rıza Akpolat, the CHP mayor of Beşiktaş, one of the richest and largest districts of Istanbul. A lawsuit is still ongoing regarding Ekrem İmamoğlu, one of the future presidential candidates of Istanbul Metropolitan Municipality and CHP, which will deprive him of his political rights.

The antithesis of the search for a “great compromise” between the CHP and the AKP is the scenario in which CHP brings together the broadest possible opposition front, especially the Kurdish movement, which is in conflict with the Turkish nationalist elements of this opposition front, in which CHP stands at the center, with the common denominator of anti-Erdoğanism. Erdoğan and Bahçeli are implementing carrot and stick policies not only for CHP but also for CHP's possible allies. For the Kurdish movement, while the Öcalan initiative and Dem Party delegations are visiting İmralı Island, detentions and arrests are continuing simultaneously. A similar process is taking place in the nationalist wing of fascist origin. Meral Akşener, formerly aligned with the CHP in the opposition ranks, moved closer to Erdoğan, prompting defections from the İYİ Party to the AKP. While the blessings of power are extended to the elements of the fascist wing other than MHP, they are simultaneously shown the stick, as was the case during the arrest of Victory Party leader Ümit Özdağ.

## **Are the Kurdish people included in the Great Compromise? Or is the Great Compromise against the Kurdish People?**

The Dem Party's local election policy was discussed within the Kurdish movement and the left, and around the concepts of “urban consensus” and “third way”, a terminology that gradually spread to the entire public opinion. The Dem Party was torn between the “urban compromise” tactic, which emphasizes alliance with the opposition in the western provinces for the municipal elections, and the “third way” orientation, which it thought to be facilitating a possible opening process with the current government. Dem Party had lost the initiative to determine the interlocutor of a possible opening process after Erdoğan won the 2023 presidential election and the People's Alliance won the parliamentary majority. The interlocutor was now set. A political line that would encourage this interlocutor to engage in dialogue and somewhat reduce the influence of the parties against dialogue, such as MHP and the army, seemed rational, and despite the reaction of the Kurdish people to Erdoğan's record of intensified repression and violence in the last 7-8 years, the politics of hoping for new openings was being voiced with more confidence. On the other hand, the recent past record left no room for doubt, and there were no concrete signals or steps to convince the Kurdish people during the local election process. The AKP's policy of “let us win and then we'll see” was not convincing but rather revolting.

It is known and experienced that the AKP's abstract and unofficial promises could be revoked at any moment, and it could take steps in the opposite direction. Therefore, following the third way policy all the way through carried a great risk. On the other side, there were concrete proposals to the Dem Party, albeit on opportunist grounds, ranging from municipal council memberships to determining who would be the mayors of some districts. While the AKP's abstract but larger promises drew the Dem Party towards the third way, and the CHP's concrete but partial offers drew it towards the urban consensus, the Kurdish movement entered the local election process with a mixed orientation with a relatively high dosage of urban consensus. The Kurdish electorate, on the other hand, has clearly set its stance in the direction of holding the regime of oppression accountable and responding to it. The reaction of the Kurdish people, which went beyond the Dem Party masses and manifested itself as a national attitude throughout Turkey, must be listed among the decisive factors in the AKP's defeat.

The despotism front foresaw this possible development before the elections and kept the trustee stick as a threat in addition to the carrot of opening. As a matter of fact, in the first month or two after the local elections, trustees were appointed only in Hakkari, and the summer months were spent with preparations for a military operation against Northern Iraq. The rumored cross-border military operation did not materialize, but with the onset of parliamentary sessions in October, the MHP wing of the government started to make opening strides towards the Dem Party. The MHP leader first shook the hands of Dem Party deputies at the opening of the parliamentary session. While the public was debating the nature of this gesture, Bahçeli made another shocking statement. Bahçeli suggested that Öcalan should come to the parliament, speak in the Dem Party group and announce that he had dissolved the PKK, in exchange for which he would be released after 26 years of imprisonment by exercising his "right to hope". Bahçeli's initiative was approved by Erdoğan and Dem Party executives held a meeting with Öcalan in İmralı prison on December 29. However, during this time, trustees were appointed to 6 Dem Party municipalities and 2 CHP municipalities won in alliance with the Dem Party, in line with the carrot-and-stick policy. Hundreds of politicians, trade unionists and journalists from the Kurdish movement were detained and arrested. Finally, Turkey started to exert intense military pressure on Rojava after the fall of Assad in Syria with the move of HTS and the Syrian National Army attached to the Turkish army.

This whole process illustrates that the Turkish bourgeoisie's search for a great compromise does not include the Kurdish people but the Kurdish bourgeoisie. The Turkish bourgeoisie, through the hands of the collaborator Kurdish bourgeoisie and with the support of imperialism, is trying to pull the Kurdish movement into a line compatible with its colonialist interests in Iraqi Kurdistan and Rojava. In this context, the process that started with Bahçeli's Öcalan opening is in harmony, not in contradiction, with the trusteeships, arrests, etc., repressions, cross-border military operations against Kurdish regions. In the background of this process, a "New Constitution" debate continues. Although the New Constitution agenda is seemingly based on the criticism of Turkey's "old" constitution, which was a product of a coup, the main subject of this agenda is Turkey's "old" borders, which have become

an obstacle for the expansionist interests of the colonialist bourgeoisie. Turkey's foreign policy, which is expressed with the Kemalist motto of "peace at home, peace in the world" and focuses on protecting its borders, is now changing. This policy, which envisages assimilating the Kurds domestically and keeping the Arabs away from Turkey in states such as Iraq and Syria abroad, is in contradiction with an expansionist perspective. In order to expand its influence towards regions where Kurdish and Arab peoples are densely populated, Turkey's colonialist bourgeoisie prefers an Islamist orientation, which is suitable for establishing a dialogue with these masses on the basis of Sunni Islam, in contrast to the exclusionary perspective of Kemalism. Within the framework of this orientation, the current government is pursuing policies that push the legal boundaries of secularism in Turkey.

The secular structure and the established Kurdish policy, which have deep roots within the Turkish state, are still widely adopted within the semi-military regime, especially in the army ranks. The riskiest step of this orientation, which envisages changes in Kurdish policy and the secular state structure and is a serious source of tension within the semi-military regime, is the Öcalan initiative. The risks of this initiative may deepen the political consequences of Bahçeli and Erdoğan's local election defeat. The success of this initiative, despite all the risks, may enable Bahçeli and Erdoğan to reverse their local election defeat. For Bahçeli and Erdoğan, the success of the Öcalan initiative will not only bring political prestige, but will also destroy the foundations of alliance ("urban consensus") between the Kurdish movement and the CHP-centered bourgeois opposition.

## **The socialist movement has carried the Menshevik politics of CHP tailism from general to municipal elections**

Neither during the 2023 presidential and parliamentary elections nor the 2024 municipal elections did the Turkish socialist movement come to the fore as an independent force. The socialist movement mostly backed the CHP. The socialists who supported Kılıçdaroğlu in the presidential elections continued to support the CHP in the metropolitan cities of Istanbul, Ankara and İzmir, which constituted the main agenda of the local elections. The fact that in some districts of metropolitan cities, and in some provinces and districts in Anatolia where the socialist left has been influential since the past, socialists ran separately from the CHP, and that socialist parties won small municipalities in a few districts does not change this overall picture.

Those who supported the bourgeoisie in the metropolitan municipalities, which constituted the main agenda of the elections, pursued policies based on reactionary utopias under the name of socialist/communist municipalism in the small districts and towns where they were relatively effective. In the few municipalities won by the socialists, no example of the socialist/communist/revolutionary municipalism described before the elections has been created, and such a thing will never be possible under conditions where municipalities are politically, administratively and financially subordinated to the central government. What is possible is a mass

mobilization of the local working people to fight against the central power with the support of the municipality in line with certain demands. After the elections, the few socialist municipalities have not been seen to be instrumental in such a mass mobilization.

Local governments are secondary to the central government, local elections are secondary to the presidential elections. But the tendencies emerging in establishment politics on the occasion of the local elections have features that will directly affect the class struggle that will sharpen in the coming period. The damage caused by the Menshevism and class collaborationism that dominate the socialist left in the ranks of the working class is much greater than one might think. As important as the position the Kurdish movement will take in this process is the extent to which the working class politics will be able to combine the right of nations to self-determination with the anti-imperialist line on the Kurdish question, and to put the fraternity of peoples alongside the unity of the workers on solid foundations. We said that the “four-year period without elections” is the program of the bourgeoisie. But on the other hand, a period without elections (for however long it lasts) can also be a good thing for us to get rid of the mental eclipse in which every election throws the ranks of the socialist left like a straw in the wind, where the socialists of the country forget even to visit the strikes and resistances of the workers in the rush for elections. But only if the right lessons are learned during this period, if we break away from the tail of the CHP and the politics of order, and turn our faces to the working class and class politics...

As a matter of fact, the summer of 2024 witnessed a serious stirring in the labor movement. Union protests against the rising costs of living and heavy taxes increased. Turkey’s largest labor confederation, Türk-İş, gathered 150,000 workers in Ankara after a series of regional rallies. DİSK also organized various actions and rallies, albeit with more modest crowds. Later, public-sector workers, particularly in the health and education sectors, also organized work stoppages and rallies against low wage increases. The resistance of workers at the Polonez meat factory in the Çatalca district of Istanbul against dismissals and for union recognition and the march on Ankara for constitutional rights brought the demands of the working class to the agenda of the country for six months. Similarly, mine workers organized a similar march from Soma to Ankara. These protests were encouraging examples of workers not giving up and not retreating despite all the police repression and violence of the despotic regime, and finally achieving gains. At the end of 2024 and the beginning of 2025, there was a serious showdown in the steel sector between the DİSK Birleşik Metal-İş union, one of the leading representatives of the combative tradition of the working class, and the Metal Goods Industry Employers’ Union (Türkiye Metal Sanayicileri Sendikası, MESS), one of the strongest bourgeois organizations in Turkey. Erdoğan intervened in favor of the MESS in the strikes in İstanbul, Kocaeli, İzmir and Gebze and banned the strikes. Despite the bans, strikes actually continued and the right to strike was defended again by strikes. These de facto strikes have resulted in collective agreements with various gains that frustrated the threats of dismissal made by the bosses by taking the strike ban behind their backs. This stirring in the class movement has shown that a different

path for the left in politics, a path of class politics, is both necessary and possible.

The equation set up by the Menshevik approach is that it is essential for the bourgeois opposition (a wide spectrum ranging from liberals to social-democrats, from political Islamists to fascists) to prevail against the despotism, and that a class politics is only possible in the relatively democratic environment created by the bourgeois opposition. Developments have proved the Menshevik political line wrong in every way. The bourgeois opposition, far from becoming a focal point of struggle against despotism, each of its components moved in different ways and at various paces to take the side of despotism at the first opportunity they saw. Examples of such moves include the CHP's support for the "normalization and détente" process with Erdoğan and the Mehmet Şimşek program, the splitting of the İYİ Party and the group led by Meral Akşener, the leading figure of the National Alliance, taking steps towards joining the AKP, and the political Islamist parties that entered parliament under the umbrella of the CHP-led National Alliance (*Millet İttifakı*) announcing their support for the AKP in the discussions on the new Constitution. Apart from the opposition of the establishment, even the Kurdish movement, with its elements under the influence of the Kurdish bourgeoisie, has moved away from perspective of "urban consensus" in the context of Bahçeli's Öcalan opening, and approached the line of the "third way", which expresses a de facto rapprochement with the regime of despotism.

Once again, we must remember that all this took place after a period in which the CHP won a municipal election victory and the front of despotism was defeated in the same election. Contrary to Menshevism's expectations, the bourgeois opposition that triumphed in the local elections did not turn the positions it gained into a focus for a liberation struggle against the despotic regime. On the contrary, the despotic regime attacked these positions by using the central state apparatus, especially the judiciary, as a stick. The message of the despotic regime to the bourgeois opposition is that if the opposition wants to benefit from the material blessings of municipal governments, it must be in harmony with the despotic regime and avoid turning the victory in municipal elections into a platform for gaining central power. The bourgeois opposition is acting in accordance with its class interests, responding to the attacks of despotism with a low profile. So much so that the Istanbul Metropolitan Municipality of the CHP and Ekrem Imamoglu, which threatens the front of the despotism the most and has the greatest opportunities, have started to act as a separate party (or an opposition alliance) outside the CHP. Time will tell whether this newly emerging de facto Istanbul Metropolitan Municipality party will turn into a focus of opposition aiming to defeat the despotism or, like other elements of the bourgeois opposition, will use its power for a more favorable compromise with the despotic regime.

## **Class politics is possible, necessary, and mandatory**

In any case, the mainstream opposition, on which Menshevism had relied against the despotic regime, is in complete misery. Nevertheless, for the majority of the

socialist movement in Turkey, there is no serious sign of breaking away from the opposition of the establishment. The Menshevik majority of the Turkish socialist movement watched the rise of the class movement from the outside, and when the class movement rose to a level that would put a stamp on the agenda of the whole country, they turned towards it, but even while turning towards it, they could not go beyond the limits of the bourgeois opposition by staying away from the rallies of Türk-İş. On agendas such as the appointment of trustees to CHP municipalities, the Menshevik left was immediately distracted and began to pursue the agendas of the establishment opposition. The Menshevik left, which does not appear at the rallies of Türk-İş, the largest organization of the working class and which carries hundreds of thousands of workers to the field, even though it is controlled by the government, is in a race to be on the rostrums of the bourgeois opposition.

However, the stirring in the labor movement will continue in 2025. The regime of tyranny has shown that Mehmet Şimşek will not back down from his austerity program. In addition to the scheduled headlines of struggle such as the contracts of public workers and the big group contract with MESS in the metal sector, it is possible that resistance will start at any moment in many workplaces with demands such as unionization, demand for a raise, etc. Experience has shown that the bourgeois opposition, due to its class interests, seeks to compromise with tyranny at the first opportunity, while the labor movement is able to mobilize even the masses of workers under the ideological hegemony of the parties of the despotic regime such as the AKP and MHP in the struggle for bread and freedom. Experience has confirmed the misery of the politics of order and shown that it is both necessary, possible and mandatory to break from mainstream politics and turn to class politics.

# Zionist genocide and resistance in Palestine following the Al Aqsa Flood

Kutlu Dâne

## Introduction

To understand better the events that took place around the line separating Gaza and the 48 territories<sup>1</sup> on October 7, 2023, and their aftermath, one must place these developments within the context of Palestine's colonization history and, in parallel, imperialism's long-term strategy in the region and around the world. The opposite would lead us to see the Al Aqsa Flood as a criminal incident, a terrorist attack, an act of vandalism targeting "civilians" sitting at home and "young people having fun peacefully" by those who crossed the "border", as presented by the imperialist and Zionist media. Such an approach would inevitably lead to conclusions that are disconnected from reality, such as a peaceful coexistence of Israel and Palestine, at best. This article aims to present a correct perspective on the issue, against the propaganda that imperialists, Zionists and their collaborators have been making since October 7 to justify Israel's genocide, which unfortunately has been accepted

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<sup>1</sup> 48 lands, or what some call "Israel", is a part of the historical Palestine excluding the West Bank, Gaza, and Jerusalem. It is under direct Zionist domination formed after Israel's advances in 1948 and 1967 and its withdrawal from parts of the historical Palestine following the 1973 war.

more than ever in the Turkish press and social media, and against the fact that the perspective of a two-state solution has found support even within the socialist movement.

### 1. Flood and genocide

On the morning of October 7, 2023, the world woke up to shocking news from Palestine. Images of a military operation initiated by Hamas, and immediately taken over by a joint operations room of all Palestinian factions were circulating. The entire world watched in astonishment as the Palestinian resistance, which had been maintaining a defensive position for a long time, crossed the “border” and reached a depth of up to 26 km in some places in Israeli-controlled territory, seized Israeli outposts, destroyed tanks, inflicted many casualties on Israeli forces and took many hostages to exchange for Palestinian prisoners. The resistance organizations’ attacks were accompanied by a barrage of rockets that reached as far as Tel Aviv. Palestinian resistance fighters raided numerous Israeli outposts, captured the Kerem Shalom and Erez checkpoints, and launched a naval attack on a base near the Gaza border. The first response Israel was able to give was to rain down fire on Palestinian militants and Israeli civilians and soldiers they had captured in the area of a music festival near Gaza from helicopters, burning all alive, actions that would only further tarnish Israel’s image.

In the first hours, it became clear to everyone that the biggest conflict in Palestine since the 1973 war had begun. Since Hamas would not make such an attempt without making a plan regarding its aftermath, it must have made significant preparations for a long urban warfare. In addition, the existence of a right-wing Zionist and aggressive government in Israel and the criminal record of Israel’s colonial practices in general told us that a fierce war would begin.

Israel’s response from October 8 onwards was primarily an intensive air campaign against Gaza, which did not discriminate between civilians and soldiers, and in which banned white phosphorus-type munitions<sup>2</sup> were used by the Zionist army. In these attacks, during which it massacred hundreds of Palestinians every day, Israel openly targeted hospitals, schools, places of worship, infrastructure facilities and refugee camps. Zionist army systematically attacked healthcare workers working in the field to rescue the wounded and to transport the dead bodies. On October 15, four Palestinian hospitals were destroyed by Israeli attacks. Two days later, Israel attacked Palestinians who took refuge in the garden of Al Ahli Hospital, and according to a statement by the Ministry of Health in Gaza, killed more than 500 of them.<sup>3</sup> The entire world waded into this attack, but in two days Israel launched

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2 “Israel: White Phosphorus Used in Gaza, Lebanon”, Human Rights Watch, 12 October 2023, <https://www.hrw.org/news/2023/10/12/israel-white-phosphorus-used-gaza-lebanon> (date accessed: 2.5.2024).

3 Statement by Dr. Ashraf Qudrat on behalf of the Ministry of Health, October 18, 2023, <https://tinyurl.com/y5475bwc> (date accessed: 16.4.2024). For an analysis that refutes US-Israeli claims that the explosion was caused by a rocket fired from the Palestinian side, see: “Israeli Disinformation: Al Ahli Hospital”, Forensic Architecture, 15.02.2024, <https://forensic-architecture.org/investigation/israeli-disinformation-al-ahli-hospital> (date accessed: 25.4.2024).

another one, this time to the Jerusalem Hospital. Previously, on October 10, Zionists had targeted the Red Cross and The United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA) centers in Gaza. These were the first steps of a barbaric attack on Gaza.

Meanwhile, on October 8, Lebanese Hezbollah began harassing the Israeli army from the north, launched a missile attack on the Shebaa farms under Israeli occupation. As Israel responded, tensions on the border reached their peak. As a result of two weeks of reciprocal attacks, Hezbollah lost more than 20 militants, but also managed to inflict significant losses on the other side. More importantly, as a result of Hezbollah attacks, the Zionists were forced to evacuate 48 Israeli settlements they had established near the Lebanese border within two weeks.

As the conflict began, Israel also expanded its attacks into Syria. It wanted to prevent not only Hezbollah but also the Iranian forces in Syria from making any attempts to assist Palestinian resistance organizations. On October 12, Zionists attacked the Aleppo and Damascus airports in Syria, rendering them unusable, and the day after, they bombed the Lebanese city of Ramya. On October 15, the Aleppo airport was once again targeted by the Zionists.

As can easily be guessed, the West Bank was also among the Zionists' targets from the very beginning. However, since this area had already been disarmed by the Palestinian Authority in line with Israel's interests, and therefore only light weapons could be brought in by the resistance organizations. Israel's work there was not so much intense urban warfare, only killing or capturing large numbers of resistance fighters through house raids. In the two weeks following the Al-Aqsa Flood, Israel killed more than a hundred Palestinians in the West Bank in these operations.

US imperialism has provided great support to Israel since the beginning of the Al-Aqsa Flood. On October 8, 2023, it assigned the US Navy's largest warship, USS Gerald R. Ford, and its accompanying ships to support Israel. On October 14, the US Marines stationed in Kuwait were ordered to suspend their training missions there and stand by ready to rush to Israel's aid at any time. Immediately afterwards, it was announced that another US aircraft carrier would be sent to the region. While the US provided direct military support to Israel on the one hand, it also supported the Zionists in achieving their goals in Gaza by obstructing attempts at the United Nations to allow humanitarian aid to enter Gaza. Thanks to the US's obstructions, the first aid truck could enter the Rafah Gate only on October 21, and in this case, Israel would only allow 20 trucks of supplies to reach Gaza, which is home to over a million people.<sup>4</sup>

Palestinians trapped in Gaza began to migrate south of the strip in anticipation of a ground offensive following the airstrikes. On October 13, the Israeli army called on Palestinians to leave their homes and move south of the Gaza Valley, and a day later, Netanyahu's statements that they would sooner or later launch a ground operation accelerated the migratory flow. When Israel launched its ground operation in Gaza

<sup>4</sup> Nidal Al-Mughrabi and Aidan Lewis, "First Aid Convoy Enters Gaza Strip from Egypt", Reuters, 22.10.2023, <https://www.reuters.com/world/middle-east/trucks-enter-gaza-carrying-medical-supplies-food-hamas-2023-10-21/> (date accessed: 18.4.2024).

on October 27, the Zionists had already killed more than 7,000 Palestinians, nearly 3,000 of whom were children, with airstrikes. In the ground operation, they first aimed to occupy northern Gaza. The first major massacre of Israel there was a result of an attack on the Jabaliyah camp, in which more than 100 Palestinians lost their lives. This was followed four days later by another one on an apartment building in central Gaza, in which the same number of civilians were killed. In addition to the clear targeting of civilian settlements, hospitals in Gaza and other cities, which provide services under very difficult conditions, were frequently targeted by the Israeli army during the ground operations and accompanying airstrikes, as they were targeted during the air campaign. On November 3, 2023, an Israeli aircraft targeted ambulances around the Al-Shifa hospital. The attack was protested by large demonstrations around the world, forcing Israel to shift its focus from Shifa. However, in late March 2024, the hospital became a target of the Zionists again. In late May, the upper floor of the Indonesian Hospital in Tel Es-Sultan was targeted by the Israeli army.<sup>5</sup> Not only hospitals, during the ground campaign in Gaza, the Israeli army frequently targeted schools, places of worship, and civilian infrastructure.

On November 22, 2023, Palestinian resistance organizations and Israel agreed on a one-week ceasefire. The conditions of the ceasefire included the release of 50 Israeli hostages in exchange for 150 Palestinian captives. Photographs and videos of the moments were taken when Palestinian organizations released their hostages and the positive attitudes of the hostages towards the militants were spread all over the world. Israel, on the other hand, released the Palestinian prisoners on the list given, while continuing to take hundreds of other Palestinians captive. After the end of the ceasefire Zionists took up the massacre where they left off. After the horrific destruction and massacres in the north, it was the turn of central and southern Gaza. On December 3, the Zionist ground offensive against Khan Younis began. At this stage, the number of Palestinians massacred by Israel had exceeded 20,000,<sup>6</sup> and the death toll continued to rise throughout December.

Starting in January 2024, the Israeli army significantly reduced its military presence in the northern parts of Gaza and focused entirely on its massacres in other parts of the strip. Interestingly, from the beginning of the ground operation, propaganda was being made that the enormous tunnel system built by the Palestinian resistance organizations would soon be rendered unusable by Israel by flooding them with sea water, thus accelerating the Zionist victory. However, as it was understood that this was impossible or would probably lead to the death of all the hostages, the subject quietly fell off the agenda. In fact, contrary to the Israeli army's predictions, the Palestinian resistance began to have a significant presence in northern Gaza again in early 2024. Videos of attacks on Israeli tanks and troops were circulating on social media, and it was understood that the Palestinians continued to use the tunnel

5 "İsrail'in Refah'a Yönelik Bombardımanları Devam Ediyor", Rûdaw, 28 May 2024, <https://www.rudaw.net/turkish/middleeast/turkey/28052024> (date accessed: 28.5.2024).

6 "Gaza Death Toll Surpasses 20,000 as UN Security Council Delays Vote on Aid", Al Jazeera, 20.12.2023, <https://www.aljazeera.com/news/2023/12/20/gaza-death-toll-surpasses-20000-as-un-security-council-delays-vote-on-aid> (date accessed: 11.4.2024).

network effectively.

During the first two months of 2024, the Israeli army continued its massacres in central Gaza. One important consequence of this was that the displaced people of northern Gaza were joined by Palestinians living in the central areas, and a significant number of Palestinians were concentrated in the southern city of Rafah. Passage south to Egypt's Sinai was impossible except for a minority who could bribe Egyptian soldiers. Even at this stage, the Zionists were making it clear that their attacks would inevitably include Rafah. In fact, they intensified their airstrikes on Rafah from March onwards. By May, an Israeli ground attack on Rafah had become increasingly likely. On May 6, Israeli forces ordered Palestinians sheltering in the eastern part of Rafah to leave the area and move towards the coastal city of al-Mawassi. A day later, Zionists seized the Rafah border crossing between Egypt and Gaza and ordered Palestinians in Rafah to evacuate a larger area. The result was that at least 450,000 Palestinians fled the city where they had taken refuge, and took to the roads.<sup>7</sup>

In late May and June, the Israeli army carried out new massacres that resulted in the death of large numbers of civilians. On May 26, it struck the Tel Es-Sultan camp, which it had previously declared a safe zone for civilians, and killed 45 people.<sup>8</sup> A day later, the Zionists bombed the al-Mawassi camp, and killed 21 Palestinians. These were followed by new attacks against the Nusayrat Camp in central Gaza. First, the Israeli army targeted a school run by the United Nations. Dozens of Palestinians were killed in this attack. Then, in a "hostage rescue operation", Zionist soldiers, supported by the US military, infiltrated the camp hiding in aid trucks. To relieve the political pressure on Israeli Prime Minister Netanyahu and his cronies, who had so far failed to rescue any hostages in combat, they turned the camp into a bloodbath while trying to rescue some hostages who would have been released anyway if Israel had accepted the recently proposed ceasefire. They first hit a market to distract the camp, then targeted anyone who stood in their way. While rescuing four hostages, they caused the deaths of three others, and brutally murdered at least 210 Palestinian civilians.<sup>9</sup>

As of June 2024, more than 35,000 Palestinians had been killed by the Zionists, more than 70,000 had been injured, and more than 20,000 were probably still under the rubble of buildings and recorded as missing. The rest were struggling with bombs, hunger, epidemics, and housing problems. On the other side, an entity with the most advanced war machines was experiencing a great humiliation, with more than 1,400 people missing, tens of thousands injured, and sirens blaring even in its major cities due to the missiles that were still raining down on it, despite the billions of dollars in military aid it received from its imperialist friends.

The Israeli army went on mass killings all around Gaza during the summer. First,

<sup>7</sup> David Gritten, "Gaza War: Almost 450,000 People have Fled Rafah in a Week, UN Says", BBC, 14. 5.2024, <https://www.bbc.com/news/world-middle-east-69008173> (date accessed: 20.5.2024).

<sup>8</sup> İsrail'in Refah'a Yönelik Bombardımanları Devam Ediyor, Rûdaw, 28.5.2024, <https://www.rudaw.net/turkish/middleeast/turkey/28052024> (date accessed: 29.5.2024).

<sup>9</sup> "Nuseirat, Anatomy of Israel's Massacre in Gaza", Al Jazeera, 11.6.2024, <https://www.aljazeera.com/news/2024/6/11/nuseirat-anatomy-of-israels-massacre-in-gaza> (date accessed: 12.6.2024).

it announced new orders of evacuation for two cities, Khan Younis and Rafah. Both were venues that Palestinian people sought refuge in. Then, on July 13, the Zionist army conducted an airstrike on Al-Mawasi camp, murdering 90 Palestinians and injuring some 300. In those days this sort of Zionist slaughter was something that the world was unfortunately used to. What was shocking was the assassination of Hamas leader Haniyeh in Tehran, by the Zionists during his visit to Iran for the oath-taking ceremony of Masoud Pezeshkian on July 31. This attack was a clear message to Iran and the resistance front as a whole regarding their support for Palestine.

On August 10, Israel attacked At-Tabeen School in Gaza, where displaced Palestinians were sheltering then, and killed 100 people. One month later, they murdered 40 more Palestinians, this time in Al Mawasi camp. An additional 60 were injured during this assault.

During the autumn, the Israeli offensive on Gaza continued. On October 5, the Israeli army launched an assault on the Jabaliya Refugee Camp, Beit Hanoun, and Beit Lahiya, and razed all the area in an operation that continued in 2025. The death toll reached to 45.000 in late November. On October 16, Yahya Sinwar, the Hamas leader in Gaza, was killed by Israeli forces during a skirmish. In a PR disaster, the Israeli army released Sinwar's last moments, which proved all the world that contrary to Zionists' claims Sinwar was not hiding in the tunnels cowardly. On the contrary he was fighting alongside his soldiers at the frontline.

By February 2025, the death toll in Gaza had reached to 61.709, and the number of injured Gazans had risen to 111.588. In addition, more than 14.222 people were reported as missing and are likely dead.<sup>10</sup> The destruction in Gaza was also enormous. Nearly all the houses in the strip, 80 percent of all commercial facilities, 88 percent of schools, half of the hospitals, 68 percent of roads, and 68 percent of cropland were destroyed by Israeli forces.<sup>11</sup>

Meanwhile, the people and resistance organizations in the West Bank, which is under the control of the Palestinian Authority, tried to respond to Israel's ongoing genocide. However, as a result of the attacks of armed settlers supported by the Zionist Israeli forces, which intensified after October 7, more than a thousand Palestinians were forced to leave their homes, and 544 Palestinians, 133 of whom were children,<sup>12</sup> lost their lives. Israel often completely cut off communication between different parts of the West Bank, imprisoning the Palestinians in small bantustans where they were living, and took thousands of them captive.

In some cases, the Israeli assault against the West Bank took the form of major military operations. In August 2024, such an operation targeted Jenin and Tulkarem. Jenin stayed under a Zionist siege for almost 10 days. As you can see in the following

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10 "Israel-Gaza War in Maps and Charts: Live Tracker", Al Jazeera, 3.2.2025, <https://www.aljazeera.com/news/longform/2023/10/9/israel-hamas-war-in-maps-and-charts-live-tracker> (date accessed: 9.2.2025)

11 "Israel-Gaza War in Maps and Charts: Live Tracker", Al Jazeera, 3.2.2025, <https://www.aljazeera.com/news/longform/2023/10/9/israel-hamas-war-in-maps-and-charts-live-tracker> (date accessed: 9.2.2025)

12 "Israeli Forces Kill Six Palestinians in West Bank Raid", Al Jazeera, 11.6.2024, <https://www.aljazeera.com/news/2024/6/11/israeli-forces-kill-six-palestinians-in-west-bank-raid> (date accessed: 12.6.2024).

sections, after the ceasefire in February 2025, the Zionist entity turned its attention to the West Bank. However, even before then, the death toll in the region was at least 905, including 181 children. Also 7.370 people were injured during the Zionist assault.<sup>13</sup>

### ***The role of the Axis of Resistance***

The question on everyone's mind from the beginning was whether the forces of Iran, some Iraqi Shia groups, Hezbollah (Lebanon), and Ansarullah (Yemen) would enter the war on the side of the Palestinians. That was because such a move could suddenly turn the Zionist genocide into a regional war, which had the potential to bring the imperialists and the forces opposing them face to face on a world scale. The Axis of Resistance, if the attacks launched by Hezbollah early on are put aside, made controlled and sometimes quite effective interventions, and avoided starting an all-out war.

However, the possibility that the Axis of Resistance might open a front from Lebanon and enter the war was an important element in the plans of the imperialist and Zionist powers in the days following the Al-Aqsa Flood. It has been frequently stated that the reason the US sent an aircraft carrier to the region was to deter Hezbollah forces in Lebanon and Iran from such an attempt. As mentioned earlier, Hezbollah launched a missile attack on the Shebaa farms the day after the Al-Aqsa Flood began, in order to remind Israel that the northern front was not empty. Throughout the Zionist genocide, Hezbollah kept the conflict at a level that would not turn into a ground war, but continued its attacks on Israel continuously. It targeted both Zionist military facilities and vehicles in the 48 territories, and launched attacks on Israeli troops in the occupied Golan Heights. These attacks featured drones and anti-tank equipment, and a large number of rockets were fired south from Hezbollah-held territory —some tactically aimed at gaining a better understanding of the principles of Israel's Iron Dome system. On November 11, 2023, another Shiite-based Lebanese organization, the Amal movement, announced that it was joining the fight against Israel alongside Hezbollah. From time to time, Hamas members stationed in Lebanon were seen trying to cross the border and attack Israeli forces. Israel sought to use its air superiority here as well, with its warplanes occasionally flying low over the Lebanese capital Beirut in an attempt to intimidate Lebanon and thus incite Lebanese elements supporting Israel against Shiite organizations in the south. It did not hesitate to use white phosphorus, which is prohibited under international law, in its attacks on Lebanese cities, as in the Dayrah attack in October 2023.

The most important result of the conflicts on the Lebanon front was that at least 60,000 Jewish settlers were forced to leave the northern part of Israel as of June 2024.<sup>14</sup> An important indicator of the extent of Israel's failure here was that

<sup>13</sup> "Israel-Gaza War in Maps and Charts: Live Tracker", Al Jazeera, 3.2.2025, <https://www.aljazeera.com/news/longform/2023/10/9/israel-hamas-war-in-maps-and-charts-live-tracker> (date accessed: 9.2.2025)

<sup>14</sup> Dov Lieber, "In Israel's North, Some Displaced Residents Call for Step Up in Fight Against Hezbollah", *The Wall Street Journal*, 27.5.2024, <https://www.wsj.com/world/middle-east/in->

the administrator of a Zionist settlement (Margaliot) went so far as to close the settlement's gate to the army forces, saying, "We are severing our ties with the State of Israel because it cannot protect us".<sup>15</sup> The forest fires that broke out as a result of Hezbollah's intensified attacks in May and June also put Israel in a difficult position, while Hezbollah forces were becoming increasingly able to hit larger targets, such as the headquarters of the Israeli army's 146th Division.

As we have mentioned earlier, Israel has carried out attacks on Syria in addition to the targets in Palestine and Lebanon throughout the war. After the attacks on October 12 and 15, Israel once again targeted Aleppo airport on March 29, killing 38 Syrian army soldiers and six Hezbollah militants.<sup>16</sup> Zionists' most significant attack occurred on April 1, when they targeted one of the annexes of the Iranian Embassy in Damascus, violating even the most basic norms of international law. The attack, which killed Mohammad Reza Zahedi, a commander of the Iranian Revolutionary Guard Corps and a supporter of Palestinian organizations against the Zionist genocide against Palestine, was part of Israel's plan to provoke a counter-attack by Iran. This would ensure that the imperialists would close ranks around itself, in response to the fact that even the countries that gave Israel a blank check in the genocide against the Palestinians were starting to become uncomfortable as the war dragged on and even began discussing sanctions against Israel.

In response, Iran first seized an Israeli ship off the Persian Gulf and then launched a comprehensive attack on Israel on April 13, which it called the True Promise (وعدۀ صادق). Although this attack, which used kamikaze drones, cruise missiles, and ballistic missiles, was described as a failed response by many, it could only be stopped with the joint efforts of France, the United Kingdom, and Jordan. It caused serious damage to the air base that had launched the attack on the Iranian embassy. Despite being carried out at very low expense to Iran, it cost Israel a staggering \$1.35 billion, thus ringing alarm bells in the US, which is not only Israel's but also Ukraine's "war sponsor", and creating pressure on Israel to stay away from such expensive activities. Immediately after the True Promise operation, Biden felt the need to declare that they would not participate in attacks on Iran.

A third possible front could be the parts of Yemen controlled by the Ansarullah movement. Starting on October 19, following the Al-Aqsa Flood, Ansarullah launched missiles on Zionist targets in 48 lands, but the US Navy in the Red Sea destroyed them before they reached their target. Then, in November 2023, Ansarullah began targeting merchant ships sailing in the Red Sea that had ties to Israel. This course of action dealt a significant blow to imperialists backing Israel, since for security reasons, many ships were forced to use the much longer route around southern Africa instead of the Red Sea and the Suez Canal, for transportation

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israels-north-some-displaced-residents-call-for-step-up-in-fight-against-hezbollah-41284bdb (date accessed: 30.5.2024).

15 "Northern Israeli Settlement Severs Ties with Tel Aviv, Demands Army Withdrawal: Report", The Cradle, 27.5.2024, <https://thecradle.co/articles-id/25106> (date accessed: 27.5.2024).

16 "More Than 40 People Killed in Israeli Strikes on Syria's Aleppo: Reports", Al Jazeera, 29.3.2024, <https://www.aljazeera.com/news/2024/3/29/more-than-30-killed-in-israeli-strikes-on-syrias-aleppo-reports> (date accessed: 3.5.2024).

between East and Southeast Asia, the Mediterranean, and European ports. Israel, in a method that would cost it the least, declared that the Ansarullah problem was an international one and stepped aside, avoiding opening a new front. The imperialist powers, on the other hand, got Israel's message and formed two separate task forces to restore trade in the Red Sea. In December, the US established a naval force called the "Prosperity Guardian" with the participation of the navies of some other countries and sent it to the Red Sea. The European Union set up the Aspides mission in February 2024. While the former still continues its mission, Aspides, which lost power after the withdrawal of the German frigate Hessen, has failed in the face of Ansarullah's attacks involving large drone clusters.<sup>17</sup> It is also understood that the attacks carried out by US and UK aircraft on Ansarullah targets have not provided the desired deterrence. Perhaps for this reason, the imperialists offered Ansarullah a bribe, promising to pay them \$1.5 billion from Saudi Arabia in the form of civil servant salaries in exchange for stopping the attacks, but Ansarullah refused.<sup>18</sup> It also warned that if Israel's genocide in Gaza did not stop, it would launch attacks on the main undersea cable off the coast of Yemen that connects the world's internet network.

During the spring and summer, Israel resumed its airstrikes against South Lebanon, and received rockets in exchange. This became a new normal in the field until September. The problem for Zionists was their inability to make their citizens return to where they lived in the northern parts of the 48 lands. This paved the way for an intensified Israeli attack on Hezbollah beginning in September. On September 17, 2024, Israel detonated thousands of pagers which had been booby-trapped before by the Zionist intelligence apparatus. This attack caused the injury of thousands of Hezbollah members. In a week, Israel launched another attack and killed 500 people. It was clear that south Lebanon was on the eve of a ground attack. But nobody was expecting a successful assassination of Hezbollah leader Nasrallah on September 28. Nasrallah's murder was a big shock for Hezbollah, both in emotional terms and in terms of a possible weakness in intelligence.

On October 1, following very intense airstrikes targeting Hezbollah and Amal forces, the Israeli ground assault against Lebanon began. The Lebanese army and the UNIFIL forces withdrew from the region, and thousands of people began moving north, escaping a new Zionist massacre. This was followed by the assassination of the new Hezbollah leader, Hashem Safiuddin, by the Zionist army on October 3. The ground operation, which was a success for Israel in breaking the military capabilities of Hezbollah and Amal forces, ended with a ceasefire on November 27. A buffer zone, consisting of the Lebanese army deployed south of the Litani River, was to be established and Israeli forces were to withdraw from south Lebanon in 60 days. By February 2025, many parts of south Lebanon were still under the Zionist occupation, and Israeli forces gave enormous harm to the villages that they

17 "EU Naval Mission Says 'Most Powerful Systems' Fail to Confront Yemenis: German Media", 6.5.2024, <https://www.presstv.ir/Detail/2024/05/06/725047/EU-admits-Yemen-military-capabilities-Red-Sea> (date accessed: 10.5.2024).

18 "ABD'den Ensarullah'a Yeni Rüşvet Teklifleri", *Yakındoğu Haber*, 10.6.2024, <https://www.ydh.com.tr/d/20046/abd-den-ensarullah-a-yeni-rusvet-teklifleri> (date accessed: 11.6.2024).

abandoned.

### ***The Blockade and humanitarian aid***

Israeli air, land, and sea attacks have been accompanied by a blockade of Gaza that prevents even the most basic human needs from being met. Trapped and bombed, around 1 million Gazans have been forced to leave their homes and move multiple times, often seeking places where they would not be targeted by Israeli bombs. Health services in Gaza cities have come to a standstill, while famine is looming in some areas. The United Nations Office for the Coordination of Humanitarian Affairs (OCHA) reported that as of May, 1.1 million Palestinians in Gaza were starving and that famine conditions were prevailing.<sup>19</sup> The destruction of 40% of Gaza's fields and orchards as a result of Israeli attacks has played a major role in this.<sup>20</sup> According to OCHA, 25 health centers and four hospitals in Rafah City and two hospitals and 21 health centers in the north became unusable. Of the 36 hospitals in total, 14 were functioning—under very difficult conditions, with shortages of supplies and electricity. There were 14,000 patients who needed to be evacuated from Gaza urgently. However, since the Rafah border crossing was invaded by Israel, only 50 patients were able to be evacuated from Gaza per day.<sup>21</sup> Due to the restrictions, drinking water and sewage services were at the brink of collapse, and epidemics also pose a major risk to the Gaza population.

What further aggravated this picture accompanying the Zionist genocide in Gaza was that Israel and the US occasionally resorted to practices that would negatively affect the distribution of the small amount of aid that entered Gaza. First, let us state that the aid supplies passing the “border” gates decreased by 2/3 after the Rafah attack began.<sup>22</sup> Then, let us give two examples of what happened during the distribution of the limited supplies that remained. First, on February 29, 2024, Israeli soldiers accompanying trucks distributing flour on Al-Rashid Street in northwest Gaza opened fire on Palestinians who rushed to the trucks due to hunger. In this incident that went down in history as the “flour massacre,” 118 Palestinians were killed and nearly a thousand were injured.<sup>23</sup> The second relates to an attack on the World Central Kitchen, one of the organizations that did not leave the people of Gaza alone during their most difficult times. The organization's 7 members, citizens

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19 “OCHA Appeals to the Security Council to End the ‘Humanitarian Catastrophe’ in Gaza”, 20.5.2024, <https://www.unocha.org/news/ocha-appeals-security-council-end-humanitarian-catastrophe-gaza> (date accessed: 31.5.2024).

20 Israel's Ecocide in Gaza 2023-2024, *Forensic Architecture*, <https://forensic-architecture.org/investigation/ecocide-in-gaza> (date accessed: 14.5.2024).

21 “OCHA Appeals to the Security Council to End the ‘Humanitarian Catastrophe’ in Gaza”, 20.5.2024, <https://www.unocha.org/news/ocha-appeals-security-council-end-humanitarian-catastrophe-gaza> (date accessed: 31.5.2024).

22 “Details of the Humanitarian Crisis in Gaza”, *Reuters*, 6.6.2024, <https://www.reuters.com/world/middle-east/details-humanitarian-crisis-gaza-2024-05-01/> (date accessed: 8.6.2024).

23 Simon Speakman Cordall, Mohammed R. Mhawish and Mat Nashed, “When Israeli Soldiers Shot at Hungry Palestinians”, *Al Jazeera*, 5 March 2024, <https://www.aljazeera.com/news/long-form/2024/3/5/the-blood-was-everywhere-inside-israels-flour-massacre-in-gaza> (date accessed: 29.4.2024).

of Palestine, Australia, Poland, Britain and the US, were murdered by Israel on April 1, 2024, despite the fact that they had clearly informed Israel of their routes and the work they were doing, and that the name of their organization was written in large letters on the roofs of their vehicles. And it was not by accident, their vehicles were targeted three times by the Israeli army at three different points!

Meanwhile, the US's "parachute aid" plan, designed to appease international public opinion, was put into action in March. This "ingenious" practice envisaged the air delivery of an amount of aid that was already insufficient for the population in Gaza. But there was more. On March 8, 2024, an aid cargo whose parachute failed to open crashed into the ground, killing 5 Palestinians.<sup>24</sup> On March 26, 12 Palestinians drowned while trying to reach the aid cargo that had fallen into the sea, and 6 Palestinians lost their lives in a stampede.<sup>25</sup>

The US announced that it would build a port in Gaza to facilitate the delivery of aid under its control. If not a port, the construction of a temporary pier was completed in May. However, the waves of the Mediterranean soon tore this facility apart and dragged it along the coast of Gaza. The pier, which was later rebuilt, was used not for humanitarian aid but for the US-Israeli joint massacre in the Nusayrat Camp.

### ***International dimension: Growing Palestinian support and lawsuits***

The magnitude of the Zionist genocide in Gaza has created a great push for solidarity with the Palestinian people in different parts of the world. Major demonstrations have been organized from imperialist centers to East Asia, from Latin America to Europe. Among these, France and Germany have openly banned demonstrations of solidarity with Palestine. In Germany, it was forbidden to carry the Palestinian flag or wear the Kufiyya. In France, Macron claimed that the demonstrations held immediately after the Al-Aqsa Flood were called by Hamas and banned them. But neither country has been able to completely prevent the ongoing demonstrations occurring in parallel with the Zionist genocide. In fact, from Germany's perspective, the preventive measures against demonstrations may have even had the opposite effect. According to a study conducted by the broadcaster ZDF in January 2024, 61% of the population in the country, where Zionism has been highly influential not only at the state level but also throughout the nation for many years, did not find Israel's attacks justified.<sup>26</sup>

Especially in the demonstrations in imperialist centers, the presence of the Arab diaspora was, as one might expect, noticeable. However, it should not be noted that contrary to the claims of the imperialist and Zionist press, the participation

24 "Aid Airdrop Kills Five People in Gaza After Parachute Fails", *Al Jazeera*, 8.3.2024, <https://www.aljazeera.com/news/2024/3/8/aid-airdrop-kills-five-gaza-israel-war-hunger-famine> (date accessed: 16.4.2024).

25 "18 Palestinians Killed in Gaza by Aid Airdrop Malfunction", *Anadolu Agency*, 26.3.2024, <https://www.aa.com.tr/en/middle-east/18-palestinians-killed-in-gaza-by-aid-airdrop-malfunction/3175307> (date accessed: 16.4.2024).

26 Sophie Tanno and Nadine Schmidt, "Crackdown on an Already Banned Hamas Raises Free Speech Fears in Germany", 28.1.2024, <https://edition.cnn.com/2024/01/28/europe/europe-germany-hamas-crackdown-free-speech-intl/index.html> (date accessed: 15.5.2024).

outside of these groups was also considerable. Moreover, anti-Zionist Jewish groups such as the Jewish Voice for Peace and the IfNotNow Movement took part in demonstrations in the USA in larger numbers than ever before. In particular, the demonstrations in New York—where protestors occupied Grand Central Station and hung a banner reading “Palestinians must be free”, with over a thousand Jews participants, 350 of whom were detained<sup>27</sup> — had repercussions all over the world. Jews took to the streets not only in the US but also in 48 territories. Although the masses participating in the demonstrations here were largely left-wing Zionists and anti-Netanyahu, it should be noted that Jews who positioned themselves as anti-Zionists (although in very small numbers), continued their actions bravely after October 7 and faced significant pressure.

Among all the anti-Israel actions, the most prominent were student protests that began on US university campuses in April 2024 and spread to some other countries. As soon as they began, they were met with harsh reactions and accusations of anti-Semitism by the US police and university administrations. Students were targeted with tasers, their tents were dispersed, and hundreds were beaten and detained. Not only students, but also faculty members who supported them and condemned the Zionist genocide were beaten, and the pressure on academics who supported Palestine on campus reached its peak. While all this was happening, large groups of Zionists insulted pro-Palestinian students, engaged in creative(!) provocations that released dozens of rats into the tent areas they set up, and attacked the student camp at the University of California (UCLA) with clubs. The US state did almost nothing against them.

The worldwide pressure demanding that the Zionist Israel end its genocide has led pro-Israeli governments to take a step back from time to time, while those who were not already on good terms with imperialism and Israel have taken bolder steps on their own lines. South Africa, which recently liberated itself from the kind of discriminatory regime that Israel imposed on the Palestinians, and which Israel supported at the time, can be said to have been a pioneer in this regard. On December 29, 2023, the government of the Republic of South Africa filed an application against Israel with the International Court of Justice (ICJ), the judicial organ of the United Nations, on the grounds that it violated the 1948 United Nations Convention on the Prevention and Punishment of the Crime of Genocide, opening the door for the Zionist genocide to be tried under international law. The court accepted the case to be heard in its first session. However, when Israel did not back down from its genocide attempt, South Africa re-applied and requested that the court immediately halt Israel’s Gaza operation, ensure the entry of experts to Gaza to assess evidence, and require Israel to report on how it will implement both the existing and newly proposed court injunctions. The court convened on January 11, 2024, and accepted these demands. In its statement of injunction requests dated January 26, it also called on Israel to take the necessary measures to prevent the actions defined in Article 2 of the convention in question, impose sanctions on Israelis who call for genocide in

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27 “We Shut Down Grand Central Station to Demand a Ceasefire”, 30.10.2023, <https://www.jewishvoiceforpeace.org/2023/10/30/wire-grand-central-action/> (date accessed: 3.4.2024).

Palestine, take the necessary steps to ensure that humanitarian aid enters Gaza, and report to the court what it has done regarding all of these. Following Israel's failure to take action and its attack on Rafah, the court made a similar statement on May 24, 2024, calling on Israel to halt its attack on the city of Rafah.

A second initiative came from the International Criminal Court, to which Palestine became a party in 2015. The court, which was established in 2002 and whose founding text, the Rome Statute, was not signed by Israel, was actually a structure created primarily to prosecute the forces opposing imperialists, and had notably targeted Serbia in the past. When, it announced in 2020 that it was investigating the crimes committed by the US in Afghanistan, Trump imposed sanctions on its prosecutor, which were lifted by Biden. In 2021, the prosecutor at the time announced that they would investigate Israel's crimes in Palestinian territories (in addition to those committed by Palestinian organizations), and was again met with a backlash from the imperialist front.

Despite the backlash and threats, the court continued its investigations. In particular, the construction of new Jewish settlements that went beyond international law was among the issues it addressed. After Israel's genocide in Gaza began, the court's new prosecutor, Karim Ahmed Khan, went to the region and conducted investigations, saying that this investigation would be a priority for the court.<sup>28</sup> The imperialists immediately stepped in, claiming that such an investigation would negatively impact the ceasefire talks.<sup>29</sup> However, on May 20, 2024, Khan applied for an arrest warrant for Israeli Prime Minister Benjamin Netanyahu and Defense Minister Yoav Galant, as well as Hamas leaders Yahya Sinwar, Mohammad Deif, and Ismail Haniyeh, on the grounds that they had committed war crimes (if not genocide) and crimes against humanity. In response, the US House of Representatives, which had previously applauded the court's arrest warrant for Putin, passed a resolution that included sanctions against the court. Prosecutor Khan told the press that a high-ranking US official who called him said, "We established that court for Africans and bandits like Putin, not for Westerners or their allies."<sup>30</sup> Thus, it was seen once again how international law is used as a tool by imperialists. Contrary to imperialists' pressures, the court issued arrest warrants for Netanyahu and Gallant, as well as Muhammad Deif of Hamas on November 21, 2024. The investigation is still going on.

## Ceasefire and Trump's plan

While the negotiations for a ceasefire and the release of hostages started right

28 Mike Corder, "After Visiting Israel and Ramallah, the ICC Prosecutor Says He Will Intensify Investigations", *The Associated Press News*, 3.12.2023, <https://apnews.com/article/gaza-icc-israel-war-hamas-prosecutor-e4077faca4a4e94c7b2c1550ce78cf57> (date accessed: 3.5.2024).

29 "ICC Urged to Delay Possible War Crimes Charges Against Israel and Hamas", *The Guardian*, <https://www.theguardian.com/law/2024/apr/29/icc-possible-war-crimes-charges-israel-hamas-g7> (date accessed: 25.5.2024).

30 Neeva Taştan, "ICC Prosecutor Threatened: Court 'Built for Africa and Thugs Like Putin'", *Anadolu Agency*, 21.5.2024, <https://www.aa.com.tr/en/middle-east/icc-prosecutor-threatened-court-built-for-africa-and-thugs-like-putin/3225897> (date accessed: 1.6.2024).

after the Al-Aqsa Flood, Israel rejected the agreement offers during this period and, as described so far, launched a massacre in Gaza. It only paused its attacks that started in October 2023 for a week in November, and then continued its negative attitude towards the ceasefire. For instance, in May, Hamas declared its acceptance of a ceasefire outline, creating a great joy among Gazans, but Israel rejected it and went on its crimes and attacked Rafah. Again in May, Biden announced that Israel was accepting a ceasefire, but Israel denied this as well. On July 2, Hamas agreed to a Biden-backed ceasefire, but Netanyahu again rejected it. Meanwhile, the negotiations that were carried out in the background continued with the approval of Israel and the US, and under the mediation of Egypt and Qatar.

November 2024 became a turning point in the war. On the 5th of that month, Trump declared his victory in the US elections. This was a positive signal for Israel in its genocide campaign against Palestinians. Trump was the man who declared Al Quds the capital of Israel in 2017, and he was also the man behind the Abraham Accords, the new Oslo for the traitors, and a big leap for Israel in its normalization attempts in the region. He had supported Israel in all fields in his previous term. Moreover on November 27, the ceasefire deal between Israel and Hezbollah was followed by the fall of Assad's rule in Syria. Takfiri armed groups took control of the country, and blocked the ground and air routes of the Resistance Front.

Trump's second term started with his rapid attacks inside and outside the US. Palestine was expected to be one of the first items on Trump's agenda. Indeed, on December 2, 2024, he declared that "there will be hell to pay" in the region if the hostages in Gaza were not freed before his inauguration on January 20. He repeated this threat again on December 16, 2024, and January 7, 2025.

A ceasefire agreement was signed on January 15, 2025, and the Knesset approved it a week later. On January 19, the deal came into effect. In its initial phase, planned to last 42 days, Israeli forces would withdraw from Gaza and this would be followed by the return of Gazans to their houses, or what's left behind. On January 27, Gazans began their walk to northern parts of the strip, via the Al Rasheed Street on foot, and via the Salahuddeen Street by their vehicles, highly uncertain about what the future held for their families, for Gaza, and for Palestine.

## **2. Why did Palestinian organizations launch such an attack?**

It is clear that the picture we have described so far is not very bright for the Palestinian people. Now, let us take a look at the reasons that led Hamas to carry out the Al-Aqsa Flood, the outcome of which is more or less certain, and thus place the operation in its historical context.

To understand these reasons, we sometimes have to go back a hundred years or more. Our readers may rightfully find it strange that we go back this far when it comes to Zionism. If we were to make a similar analysis for a massacre committed by imperialists, there would probably be no need for such a reference to the long history of imperialism. However, there are some facts about Israel that are confusing even for militants with anti-imperialist views. These facts are not as widely known as the history of imperialism, but they directly inform our current political stance.

Of course, our aim here is not to convey these to the reader in detail. Therefore, we will move on from those that are sufficient to form the basis for what will be said on October 7, 2023.<sup>31</sup>

### ***Zionist settler colonialism in Palestine***

The first development that led Palestine to become a “matter” was the emergence of the Zionist ideology. Emerging in the late 19th century, Zionism spread among the Jewish people, just as the Nazi ideology spread among German society. The Zionist ideology wrongly advocated the establishment of a Jewish state in Palestine, where another people had already been living at the time, and the organization of mass Jewish migrations to this place, in order to save the Jewish people who were oppressed in different parts of Europe, especially in the Russian Empire. To achieve this goal, it relied on the support of the imperialist powers. Being one of these powers, the German Empire, was unable to convince its ally, the Ottoman Empire, to implement the Zionist plan in Palestine. On the other hand, the United Kingdom, which had been indifferent to the Zionist movement for a long time, began to support it during the course of World War I. The motive behind this move was the belief that the movement could significantly influence the United States would join the war on Britain’s side and help secure new war credits. The Balfour Declaration, published by the United Kingdom in 1917 and signed by France, the United States, and Italy a year later, meant the title deed of the Palestinian lands for the Zionists. It should be noted that the owners of the title deed and the person who gave it were both living far away from Palestine at the time. We will see what this means shortly.

The Zionist movement, which had a significant influence on the decision-making bodies of major US banks and US politics, did indeed ensure that the wishes of British imperialism were realized. After winning the war, the United Kingdom, which seized Palestine and established a mandate there, became, in return, an intermediary in the realization of the Zionist project. Especially after 1924, a large Jewish migration to Palestine, supported by this country, began. All social and economic balances in the region were disrupted in a short period of time. By 1931, 200,000 Palestinian Arabs had lost their lands. The mandate administration seized the lands of Palestinians who could not pay their taxes and helped transfer these lands to Jewish settlers. The settlers also benefited from various other privileges and support provided by the mandate administration.<sup>32</sup> In the 1930s, the Zionists also established their first organizations. Their terrorist organizations such as the

31 We provided more details about the Palestinian issue, especially the first period, in our article “The Centenary of the Balfour Declaration, Imperialism’s Visa for the Nakba and Zionist Occupation” in the 2018 edition of Revolutionary Marxism ([http://www.devrimcimarksizim.net/sites/default/files/the\\_centenary\\_of\\_the\\_balfour\\_declaration\\_imperialists\\_visa\\_for\\_nakba\\_and\\_the\\_zionist\\_occupation\\_kutlu\\_dane.pdf](http://www.devrimcimarksizim.net/sites/default/files/the_centenary_of_the_balfour_declaration_imperialists_visa_for_nakba_and_the_zionist_occupation_kutlu_dane.pdf)). We suggest reading the works of Jewish historians Ilan Pappé and Avi Shlaim, as well as Ralph Schoenman’s *The Hidden History of Zionism*, for detailed analysis of the issue.

32 Ralph Schoenman, *The Hidden History of Zionism*, <https://www.marxists.org/history/etol/document/mideast/hidden/index.htm> (date accessed: 1.11.2024)

Haganah and the Irgun were supported by Britain. These developments inevitably led to unrest within Palestinian society. When the Palestinian people rose up in a mass uprising against the mandate and the Zionist project between 1936 and 1939, involving a tax boycott and a general strike, the Zionists coordinated with the mandate to suppress the uprising.<sup>33</sup> Israel was thus formed as a germ within the heart of British colonialism in the interwar period.

After World War II, the flagship of world imperialism was the United States. The United Kingdom's decline in this sense was also observed by the Zionists it had patronized in the mandate Palestine, as it had serious difficulties in maintaining control in the region. The United States, on the other hand, criticized the United Kingdom for its attempts to limit Zionist immigration, which made things even more difficult for the mandate administration. Realizing that it could not govern Palestine under these conditions, the British passed the issue to the United Nations. A Partition Plan prepared here, envisaged the division of Palestine into two separate states, giving 54% of the Palestinian land to 630,000 Jews and 46% to 1,300,000 Arabs. As expected, the Palestinian Arabs rejected this unjust plan. The Zionists' response was to launch an attack on the Arabs. As a result of an open ethnic cleansing operation, 385 out of 475 villages and towns were wiped off the map, settlements such as Deir Yasin became the scenes of massacres, and Palestinians living in Haifa were besieged and forced to board ships and flee the city. Overall, a total of 750,000 Palestinians were forced to leave Palestine, a part of Palestine, larger than the area given to Israel by the UN's partition plan remained in Zionists' hands. These events, which resulted in the declaration of the entity called Israel, are remembered by Palestinians today as the Nakba (Catastrophe).

The establishment of Israel was a disaster for the Palestinians, as well as its aftermath. The Zionists never allowed the Palestinians they had displaced from their lands to return. The Palestinians who fled from 144 different settlements in Palestine during the Nakba and came to Gaza caused the population there to increase several times.<sup>34</sup> Today, having settled in several refugee camps, they constitute the majority of the population of Gaza. In 1950, Israel passed a law that confiscated the property of these people, thus transferring all their wealth to the Jews, similar to how the ruling classes of the time in Türkiye seized the property of Armenians who were massacred or forced to flee during the genocide.<sup>35</sup> The Zionist settlers established hundreds of new cities and towns, including the settlements around Gaza, and settled in these lands.

Israel did not stop thereafter. After winning the war against the Arab armies in 1967, it seized even more land. When it entered Lebanon to suppress the Palestinian resistance, it was either the perpetrator or a collaborator of the Phalangist forces in many massacres, especially the Sabra and Shatila massacres in 1982. It continued to massacre the people trying to return to their lands, bloodily suppressed the two

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33 Schoenman.

34 Beryl Cheal, "Refugees in the Gaza Strip, December 1948—May 1950", *Journal of Palestine Studies*, vol. 18 no. 1, 1988, p. 138.

35 See Sungur Savran, "Sınıf Mücadelesi Olarak Ermeni Soykırımı", *Devrimci Marksizm*, no. 23, 2015.

major Palestinian uprisings, the First and Second Intifadas, increased the pressure on the Palestinian people in the West Bank with both its military force and armed settlers, and killed 1,500 and 2,000 people in its attacks on Gaza in 2008 and 2014, respectively. In all of these, Israel received support and/or approval from all the imperialist powers, and every massacre it committed was supported by these powers as “Israel’s right to defend itself.”

The establishment of Israel and the subsequent expansion of its borders, as we have explained, is a special type of colonialism: *settler colonialism*. Unlike classical colonial practices, settler colonialism has some parallels with the conquests of earlier eras. Settler colonists not only exert military and administrative control over a territory, but also permanently displace the population living there and replace it with themselves. In doing so, they resort to massacres and/or ethnic cleansing. Examples of this are Great Britain’s colonies in North America and Rhodesia (Zimbabwe), France’s colony in Algeria, and the Netherlands’ colony in South Africa. Israel is a settler colonial power that seizes Palestine’s underground and surface resources, expels Palestinians from their lands, and establishes its own settlements on those lands. It frequently resorts to the low-wage labor of Palestinians who have lost their means of production and become proletarians in a way that can be likened to slave labor at a certain level of abstraction.<sup>36</sup>

The exclusive economic zone of the 48 lands over the sea contains around 1 trillion cubic meters of natural gas today. This is equivalent to about a quarter of the natural gas resources in the entire Eastern Mediterranean<sup>37</sup>, and the Palestinian people cannot access these resources; instead, they are all seized by Israel. Israel is not content with simply seizing this resource; it also prevents the Palestinians from using the gas reserves in the exclusive economic zone of Gaza, which some sources say also amount to 1 trillion cubic meters. Likewise, the oil resources belonging to the Palestinians, whose extraction is prevented by Israel, and Israel’s plundering of the natural resources in the Dead Sea can be considered in this context. The list is quite long, but the clear truth is that there is a Zionist entity, Israel, that exploits all of Palestine’s resources.

### ***Ethnic cleansing***

A very important element of the Nakba that took place in 1948 was *ethnic cleansing*. Hundreds of thousands of Palestinians were uprooted and exiled from their homes by terrorist organizations that would later become the Israeli army. However, ethnic cleansing was not completed and ended in 1948 or a few years after that; on the contrary, it became systematic from 1948 onwards. It reached very large dimensions once again during the 1967 war and in the years that followed.<sup>38</sup>

36 For an early study of the colonization of Palestine, see: Fayez Sayegh, *Zionist Colonialism in Palestine*, Beirut: Palestine Liberation Organization Research Center, 1965.

37 Faruk Can, “Doğu Akdeniz’de Ne Kadar Doğal Gaz Rezervi Var?”, *Euronews*, 31.12.2019, <https://tr.euronews.com/2019/12/31/dogu-akdeniz-ne-kadar-dogal-gaz-rezervi-var-en-buyuk-payihangi-ulkeler-alacak>, (date accessed: 4.5.2024).

38 The Arabs called the 1967 war, in which nearly 300,000 Palestinians were driven from their lands, the Naksa (the defeat).

Israel's constant annexation of new land in Area C<sup>39</sup>, which constitutes two-thirds of the West Bank according to Oslo II Agreement of 1995, the issuance of building permits to Jewish settlers but not to Palestinians<sup>40</sup>, the demolition of Palestinian homes in different parts of the West Bank under various pretexts<sup>41</sup> and the subsequent seizure of the land from the owner of that home, discriminatory immigration laws, and forced deportations are all aspects of ethnic cleansing.

The situation is similar in Jerusalem. While Israel is a direct occupier of the western part of the city, it also claims sovereignty over East Jerusalem, which it has controlled since the 1967 war, in violation of international law. This is a result of Israel's claim to make the whole city its capital. More than 360,000 Palestinian Arabs live in East Jerusalem, who refuse to become Israeli citizens and to whom Israel has granted a special residence permit under the mandatory provisions of international law. Unlike Jewish Israelis living in the city, Israel can expel them from East Jerusalem on the grounds that their homes are not their primary residence, or that they or one of their family members have engaged in anti-Israeli activity. It will be recalled that the decision to evict six Palestinian families from the Sheikh Jarrah neighborhood in East Jerusalem in 2021 (families who had settled there after being expelled by Israel from different parts of Palestine) and to replace them with Jewish settlers sparked protests that resonated around the world. According to B'Tselem data, more than 14,000 Palestinians in Jerusalem have been targeted by this ethnic cleansing practice since the 1967 war.<sup>42</sup> A similar situation applies to Naqab in southern Palestine, where Israel frequently declares areas used by Bedouins as military zones in order to displace them.

The aim of ethnic cleansing is to ensure that Israel is a demographically pure Jewish state. Therefore, the ethnic cleansing practices against the Palestinians were accompanied by Israel's invitation of Jews from all over the world to the occupied Palestinian territories based on the so-called Law of Return. Even the settlement of more than 3 million Jews in Palestine through such means could bring the Jewish population to only 3/4 of the total population in the 48 territories. Therefore, Zionist ethnic cleansing in Palestine is still ongoing.

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39 The West Bank was divided into three areas by the Oslo II Agreement of 1995: Areas A and B, consisting of 165 independent islands, were placed under the direct control of the Palestinian Authority, while the area outside of these, comprising 61% of the West Bank, was left under Israeli control, known as Area C. Israel has been using this area for its own use by creating Jewish settlements, national parks, military areas, etc. In this way, it has already swallowed up 60% of Area C. "Planning Policy in the West Bank", *B'Tselem*, 11.11.2017, [https://www.btselem.org/planning\\_and\\_building](https://www.btselem.org/planning_and_building) (date accessed: 10.6.2024).

40 According to data from Peace Now, Israel granted only 98 of 4,422 building permit applications from Palestinians in Area C between 2009 and 2018. <https://peacenow.org.il/en/approvals-for-palestinians-in-area-c-2009-2020> (date accessed: 3.5.2024).

41 According to data from the UN Office for the Coordination of Humanitarian Affairs (OCHA), since the beginning of 2009, the number of Palestinian buildings demolished by Israel is 10,761. These demolitions have resulted in the displacement of 16,303 people. <https://www.ochaopt.org/data/demolition> (date accessed: 3.5.2024).

42 "Statistics on Revocation of Residency in East Jerusalem", *B'Tselem*, 11.1.2011, [https://www.btselem.org/jerusalem/revocation\\_statistics](https://www.btselem.org/jerusalem/revocation_statistics) (date accessed: 28.4.2024).

## Apartheid

An integral part of Zionist ethnic cleansing is the systematic discriminatory practices that also aim to force Palestinians to voluntarily emigrate, namely *apartheid*. This word, which comes from Afrikaans, an extension of the Dutch language in Africa, was used to describe the discriminatory practices of another settler-colonial group that emerged in the same year as Israel: European settlers in South Africa who oppressed the indigenous population. Although South African Apartheid ended in 1994<sup>43</sup>, the term has been used to describe similar practices in other parts of the world, especially Zionist Israel's discrimination against Palestinians.<sup>44</sup>

What makes Israel an apartheid state is that, in addition to ethnic cleansing, it applies the legal order and administrative practices differently for the Jewish population and the Palestinians both within the 48 territories and in the occupied territories.<sup>45</sup> At the forefront of apartheid practices, as we have mentioned above, is the contradiction between granting any Jew the right to settle in Israel, regardless of where he or she comes from, while denying the same right to Palestinians who left the country in 1948 and 1967 and became refugees.<sup>46</sup> By not recognizing the right of return of Palestinian refugees, Israel is also violating international law.

Let's correct a mistake while we're at it. Palestinians living in the 48 territories<sup>47</sup> do not live the same prosperous lives as Jewish Israeli citizens. This is nothing more than a propaganda created by Israel to discredit the accusations of apartheid against it, and it has successfully used some Palestinian social media celebrities for this purpose. There are significant differences between these and Jewish Israeli citizens in terms of living standards, livelihoods, access to education and healthcare, and cultural services provided to them.<sup>48</sup> A striking example from recent months is the punishment of Arab students in the 48 territories for reasons such as their social media posts following the Al-Aqsa Flood. While many Arab students voiced their reaction to the genocide launched by Israel, their schools opened investigations against them

43 Let us also point out that, although Apartheid has formally ended in South Africa, the most important features of this regime continue unabated in the post-Apartheid country.

44 The apartheid practices to which Israel subjects the Palestinian people were recently addressed in a comprehensive report prepared by Amnesty International. The report clearly demonstrates that Israel is acting in violation of the 1973 United Nations Convention on Apartheid and the Rome Statute of the International Criminal Court. Amnesty International, "Israel's Apartheid Against Palestinians: Cruel System of Domination and Crime Against Humanity", 1.2.2022, <https://www.amnesty.org/en/documents/mde15/5141/2022/en/> (date accessed: 20.4.2024).

45 The Adalah (Justice) Center provides a breakdown of more than 65 legal regulations that discriminate against Palestinians, beginning with the Law of Return, enacted by Israel in 1950. <https://www.adalah.org/en/content/view/7771>

46 "A Regime of Jewish Supremacy From the Jordan River to the Mediterranean Sea: This is Apartheid", *B'Tselem*, 12.1.2021, [https://www.btselem.org/publications/fulltext/202101\\_this\\_is\\_apartheid](https://www.btselem.org/publications/fulltext/202101_this_is_apartheid) (date accessed: 17.5.2024).

47 They are a minority of Palestinians living under direct Israeli rule. They were able to stay in Palestine during the Nakba, or somehow managed to return. While their number in 1948 was about 150,000, compared to 750,000 Palestinian refugees, it has grown to 1.7 million today, making up 21% of Israel's population. Joel Beinin and Lisa Hajjar, *Palestine, Israel and the Arab-Israeli Conflict*, Middle East Research and Information Project (MERIP), 2014, p. 6, [http://merip.org/wp-content/uploads/2017/02/Primer\\_on\\_Palestine-IsraelMERIP\\_February2014final.pdf](http://merip.org/wp-content/uploads/2017/02/Primer_on_Palestine-IsraelMERIP_February2014final.pdf)

48 Amnesty International, "Israel's Apartheid Against Palestinians"

and also reported them to the police. 36 schools opened investigations against 124 students, and gave punishments to half of them. However, no investigation has been opened for the posts of Jewish students, even those advocating the annihilation of Palestinians.<sup>49</sup> Generally speaking, the standard of living in Arab cities is below that of cities where Jews are the majority. In short, saying “There are Arabs living in Israel, so there is no problem” is like claiming that there is no national issue because Blacks are granted citizenship in the US or Kurds in Türkiye.

Israeli Apartheid grants Jews the right to settle anywhere they want, including the West Bank, while depriving Palestinians of this right. Since Palestinians will lose some of their rights when they move from the 48 territories to the West Bank, all doors are opened to them by Zionists. When a Palestinian from the 48 territories marries another Palestinian from the West Bank or Gaza, they are not allowed to settle in the 48 territories together. However, there is no such obstacle for an Israeli citizen who marries, for example, a European. There are cities in the 48 territories where only Jews can settle. As stated above, Israel expropriates Palestinian lands in East Jerusalem and the West Bank, offers them for the use of Jewish settlers, or turns them into military, industrial or agricultural zones closed to settlement. The house demolition practices we mentioned earlier are also entirely directed at the Palestinian population. If a member of a family is considered a “criminal” by Israel, the house where the family lives can be easily demolished. Those living in East Jerusalem, which is under Israeli occupation, lose their right to housing if they stay outside the city for a long time, unlike Jews living in the same city. In the West Bank, the movement of Palestinians between different regions is systematically prevented by Israel through practices such as walls, checkpoints and roadblocks. There are no restrictions on Jewish Israeli citizens traveling abroad. However, Palestinians living under occupation or blockade in Gaza, the West Bank or East Jerusalem must obtain permission from Israel when traveling abroad. Furthermore, they are not allowed to use Ben Gurion Airport in the 48 lands. In the unlikely event that they do obtain permission, they must travel to Jordan or Egypt to board a plane from there.<sup>50</sup> Palestinians can be held captive by the Israeli judiciary without being charged with any crime, and held in prison for months without being able to see their lawyers or even appear in court— a practice called administrative detention. Trampling even the most basic principles of law, administrative detention is accompanied by widespread torture and ill-treatment.<sup>51</sup>

The list can be extended. But perhaps more importantly, far from stepping back from the practices on this list, Israel has enacted a legal regulation that all these discriminatory practices can reference: the Jewish Nation State Law of 2018. The law removed Arabic as the official language and defined Israel as the state of the Jewish people. Thus, the subjection of non-Jews to preferential treatment in the 48 territories has become entirely legitimate.<sup>52</sup>

49 “Repression of Palestinian Students in Israeli Universities and Colleges”, *Adalah Center*, 9.5.2024, <https://www.adalah.org/en/content/view/11116> (date accessed: 30.6.2024).

50 “A regime of Jewish supremacy from the Jordan River to the Mediterranean Sea”

51 Amnesty International, “Israel’s Apartheid Against Palestinians”

52 “A Regime of Jewish Supremacy from the Jordan River to the Mediterranean Sea”

### ***Palestinians are becoming more and more strangled***

Even the picture we have drawn so far, which is full of shortcomings and is too brief, is sufficient to understand what kind of enemy the Palestinian people have had to fight and under what conditions. The Palestinian people have continued their struggle tirelessly to this day with every tool they have found. In particular, the uprising against both the United Kingdom and the Zionists between 1936 and 1939, which included general strikes and tax boycotts, and the two separate Intifadas<sup>53</sup> that began against the Israeli occupation in 1987 and 2000, demonstrate their courage in taking up the struggle despite being at a disadvantage in the face of the enemy. Although these were ultimately unsuccessful, they left an important legacy in shaping the Palestinian struggle for freedom.

At this point, it is necessary to emphasize that the Palestinian struggle has evolved through different phases. Following the end of the Second Intifada in 2005, the Palestinian people and resistance organizations have generally remained in a defensive position against their settler and colonial enemies, with the exception of the “Knife Intifada” and rocket attacks from Gaza to the 48 territories from time to time. There are many reasons for this: the turning of the West Bank into a bed of roses for Zionism by the so-called Palestinian Authority, the tensions among Palestinians after the 2006 elections and the resulting de facto separation between the West Bank and Gaza, and the significant decline in the number of Palestinian allies providing military support, despite the increasing support of imperialism for Zionism.

So how did this defensive position change, how did a different phase begin, and how did Palestinian organizations make or have to make a countermove? In answering these questions, it should first be emphasized that 2017 was an important turning point. In December of that year, US President Trump announced that he accepted Jerusalem as the capital of the “State of Israel” and that he would move the US embassy there. Yet the city is seen by the Palestinian people as the historical capital of Palestine. Even the Oslo process, which was intended to secure the will of the Palestinian people, placed the Jerusalem issue as the last item in possible peace talks and gave the green light to at least the eastern part of the city becoming the capital of Palestine. Trump’s move was understood by the Palestinians to mean that Jerusalem would be taken away from them forever.

This was followed by the enactment of the aforementioned 2018 Jewish Nation State law, which once again confirmed that Israel’s occupation of Palestinian lands would be permanent and that no steps could be taken to grant Palestinians their rights. That same year, the Gazans, who had been living under a brutal Zionist

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<sup>53</sup> The First Intifada, which began in 1987, was sparked by protests following an incident in which a Zionist drove his car into Palestinians, and quickly spread throughout Palestine. In contrast to this major uprising, which is often referred to as the “Stone Intifada” because Palestinians responded to Israeli forces’ attacks by throwing stones at their demonstrations, the Second Intifada, which began in 2000, involved more intense involvement by Palestinian organizations and armed forms.

blockade since 2007, organized a series of unarmed demonstrations called the Great March of Return. Every Friday, they gathered along the border separating the 48 territories from Gaza to voice their desire to return to their land and demand the lifting of the blockade on Gaza. In these demonstrations that continued in 2019, Israel killed a total of 214 Palestinians, 46 of whom were children, with sniper fire. Thus, it once again confirmed that the only language it understands is armed struggle.

The year 2020 witnessed another development that horrified the Palestinian people. The United Arab Emirates (UAE) and Bahrain, through the mediation of US imperialism, “normalized” relations with Israel and signed documents called the Abraham Accords. Thus, they recognized the State of Israel and began to establish diplomatic relations. As might be expected, economic relations also began rapidly. These two countries were followed by Morocco and Sudan. Particularly, the fact that the UAE, which has become one of the major powers of the Arab world for some time now, established relations with Israel gave the Palestinian people a sense that the circle around them was tightening. Neither this country nor the other three had any political or military support for Palestine, but at least the fact that they did not establish relations with Israel despite all the pressure from US imperialism was a gain for Palestine.

Saudi Arabia, which has a very important position in the Arab world, did not take part in this first wave of the Abraham Accords. This was not out of a desire to avoid stabbing the Palestinian people in the back, but because Saudi Arabia wanted to have nuclear energy (read this as nuclear weapons) more than others, in order to participate in such a move that would strengthen Israel’s hand.<sup>54</sup> Palestine was a bargaining chip with imperialism in Saudi Arabia’s plans for a future in which oil revenues would decrease. When direct flights began between the UAE and Israel following the Abrahamic Accords, Saudi Arabia announced to both parties that its airspace was now open to Israeli planes as a “wedding gift.” The seriousness of the situation was then understood by the Palestinian people. Other signs emerged later, and finally, the first visit of an Israeli minister to Saudi Arabia in September 2023, just before the Al-Aqsa Flood, demonstrated to the Palestinians that Saudi Arabia was falling in with the normalization with Israel.

Turkish president Erdoğan, who gained the sympathy of the Palestinian people with his “One minute” remark to Israeli President Shimon Peres at a meeting held within the scope of the World Economic Forum in early 2009, and who supports Muslim Brotherhood factions including Hamas in alliance with Qatar, hosted Israeli President Herzog in Ankara on March 9, 2023. The two countries’ renewed rapprochement was another development that made the Palestinian people feel that the noose around their necks was tightening a little more. Erdoğan was doing this as an extension of his normalization policy with imperialism in order to get rid of the economic situation he had put Türkiye in. He also aimed to earn income

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<sup>54</sup> In order to further escalate the bargaining, Saudi Arabia reached an agreement with Iran on March 10, 2023, with the mediation of China, which the US never wanted to have influence in the region.

from marketing the gas stolen from the Palestinians by Israel to Europe through Türkiye. A week before this visit, Amnesty International's Apartheid report, which we mentioned in previous headings, had made a splash all over the world, and Israel's image had suffered a significant wound. As Erdoğan turned to treating this wound instead of deepening it, the Palestinian people once again understood that the support given to Hamas by its political allies, Qatar and Türkiye, is only lip service, since both have strong relations with imperialism.

In addition to all this negative picture, the few months before the Al-Aqsa Flood witnessed new raids on Al-Aqsa, which Palestinians consider sacred. In the last of these, on October 5, 2023, 800 Zionists, accompanied by Israeli security forces, raided the mosque, beat worshippers, and attacked Palestinian shops in the area. Moreover, the same week television channels broadcast images of Zionists spitting on Christian Palestinians leaving their places of worship to the entire world. Such attacks had become unbearable, yet they were not new.

What was new was that 10 days before the Flood, Netanyahu waved a map of the Levant without Palestine on it to the whole world at the United Nations General Assembly, thus declaring that they would erase Palestine from history.

Everyone was joining the enemy, the enemy was getting more courageous, increasing its attacks. Palestinian organizations saw this and, crossing a non-real border, they fought against the army occupying their land and the settlers who had settled on their land as an instrument of that army's aims. They gave a new and inevitable response to the occupation and humiliation that had lasted for a century.

### **3. What should be the attitude in a war led by Hamas?**

We have explained the reasons for this response, its legitimacy and why it was given now. Now, it is necessary to go a step further and briefly explain why the ideology of the most powerful organization of the Palestinian resistance that planned this response, and the form of the response do not undermine this legitimacy.

First of all, it should be stated that the fact that Hamas, a much younger organization compared to other Palestinian groups founded in the 1950s and 1960s (established in 1987), has become the strongest Palestinian resistance organization is not an Israeli or US project, as is sometimes claimed. Israel may have taken advantage of the rise of Hamas to undermine sympathy for the Palestinian cause by using anti-Islam sentiment in imperialist centers. It may also have wanted the Palestinian movement to be more fragmented, with the emergence of an organization that could be more easily controlled by reactionary Arab regimes. To assert anything further than this requires at least certain evidence.

In the absence of these, it would be more logical to look in another direction. That is the staggering Fatah, the secular flagship of the Palestinian struggle, and the Palestine Liberation Organization, which has lost much of its prestige in the eyes of the Palestinians as a result of its vacillations, openings and, concessions towards Israel, none of which have benefited the Palestinian people. Another Islamic movement, Islamic Jihad or the communist Popular Front for the Liberation of Palestine (PFLP), could not fill Fatah's void. As a result, Hamas eventually won

the 2006 elections for the Palestinian legislative council, and sympathy for it has increased over the years in Palestine.<sup>55</sup>

Hamas's religious ideology does not have the content needed to save the Palestinian people not only from Zionism but also from all forms of oppression and exploitation. While it has more advanced aspects than the other factions of the Muslim Brotherhood, the relations of these factions with imperialism and the general decline of the movement in the region are also Hamas' weak points.<sup>56</sup> Despite this, in a war, what determines the position that revolutionary Marxists should take (and what most Marxists have long forgotten) is not the ideologies of the warring parties, but their mutual relations and the reason they fight. The situation is clear in this sense both before and after the Al-Aqsa Flood. Hamas and other Palestinian resistance organizations are the armed forces of the oppressed people fighting against their colonizers against Israel. The reason for the war, as we have stated above, is Zionism's ethnic cleansing and settler colonialism, which is also supported by imperialists. Therefore, what needs to be done is to support Hamas' struggle against the colonialist, like that of all other resistance organizations. Remaining neutral between Israel and Hamas, or between Israel and any Palestinian resistance organization, means nothing more than a shy support of Israel. However, as we have already stated, since Hamas lacks the capacity to bring Palestine to its final liberation and will, at some stage of such progress, stand against the most advanced units of the Palestinian people, our support will be conditional and temporary. In fact, the PFLP, which fought against Zionism on its own land and gave martyrs, is in such an alliance with Hamas.

Now let's come to the content of the response. First of all, Israel's occupying/colonialist character makes it legitimate and necessary for the Palestinian people's response to take military forms. It is unnecessary to discuss the reasons for this at length here. The fact that Israel responded to the Great March of Return demonstrations that we have just mentioned by slaughtering civilians with sniper fire clearly shows what kind of struggle the situation requires. Of course, such a struggle does not exclude other forms of struggle by the Palestinian people.

However, military struggle sometimes carries the risk of causing civilian

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55 Of course, it is not possible to conclude from this statement that Fatah has completely lost its prestige as an organization. However, it is clear that the prestige of the organization under the leadership of Mahmoud Abbas is quite low in the eyes of the Palestinian people. A striking example is that, while Abbas was expected to receive 38% of the votes, Hamas leader Haniyeh was projected to secure 53% in a possible presidential election. However, if Marwan Barghouti, who is being held captive in Israel, had been chosen as the Fatah candidate instead of Abbas, the votes that would go to Haniyeh would have dropped to 33%, while Barghouti would have secured 63%. "Public Opinion Poll No. 85", Palestinian Center for Policy and Survey Research, September 13-17, 2022, <https://pcpsr.org/en/node/920> (date accessed: 31.5. 2024). The PFLP's influence and level of organization within the Palestinian people deserve to be addressed in a separate study, and the analysis of why this organization, which has a very important historical background and tradition of struggle, is not in a more advanced position in terms of gaining the leadership of the Palestinians today will undoubtedly contain very important lessons for the revolutionary movements of the region.

56 Hamas faltered in the face of Zionism in 2017. In its Policy Document launched in that year, it included statements that would lead to accepting Israel's 1967 borders and to abandoning the goal of destroying Israel. Kutlu Dâne, "Hamas Yalpalıyor", *Gerçek Newspaper*, 3.5.2017, <https://gercekgazetesi1.net/uluslararasi/hamas-yalpaliyor> (date accessed: 5.3.2024).

casualties. From the images that were broadcasted to the world starting from the morning of the Al-Aqsa Flood operation, it is understood that this risk has occurred. While this situation is easily used as a material for Zionist propaganda, it also causes question marks to arise in the minds of many people who support the struggle of the Palestinian people. It should be stated that we are not happy about civilian deaths, and that we do not advocate the killing of civilians. However, we must also add that civilian deaths are unfortunately frequently encountered in anti-colonial rebellions<sup>57</sup>, and that behind this lies the accumulated anger of the colonized people. This does not make the oppressed people's liberation struggle against the colonizer illegitimate or unjust. When viewed in general, the unjust side of the war is responsible for civilian deaths, and that is Israel itself.

We believe that it would be good to make a comparison between the Palestinians and the Zionists who colonized Palestine concerning the targeting of civilians, without any intention to justify civilian deaths. Since 1948, Israel has never hesitated to knowingly and willingly target civilians as a part of ethnic cleansing. The Great March of Return mentioned above is an example of this. But it is not the only one. It is clear that they targeted civilian buildings in their previous attacks on Gaza, as well as in this latest one. Another example is the bombing of three separate convoys of civilians fleeing south amid their attacks on Gaza after the Al-Aqsa Flood.<sup>58</sup> In contrast, Palestinian resistance organizations target *primarily* the Israeli army and armed settlers.

It doesn't end there. There is also a gap between the Zionists and the Palestinians in terms of the reliability of the data on civilian deaths and ill-treatment. Israel often claims that the numbers given by the Palestinians regarding their own casualties do not reflect the truth and are inflated. This claim was also made by Israel's ally, the United States, during the recent Israeli attacks. However, both the United Nations and humanitarian organizations working in the region have made clear statements that the casualty and injury figures given by Palestinians after Al Aqsa Flood largely reflect the truth.<sup>59</sup> Philippe Lazzarini, the representative of UNRWA,

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57 During the war of independence between 1954 and 1962, the National Liberation Front (Cebhetu'l-Tahriri'l-Vatanî, commonly abbreviated as FLN) in Algeria occasionally carried out actions targeting Algerian-born French people called "Pieds-Noirs." A notable example of these was the timed bomb planted by female FLN militant Cemile Buizze in a bar called Le Coq Hardi on January 7, 1957, which killed many French people. Faik Bulut, "Cezayir Savaşı'nın Meşhur 'Bombacı' Kadınları", *Independent Turkish*, 14.3.2021, <https://www.indyuturk.com/node/329636/turkiyeden-sesler/cezayir-savasinin-meshur-bombaci-kadinlari> (date accessed: 30.5.2024). Because of their role in the French atrocities, the attacks on the "Harkis" who sided with France in the war of independence continued even after Algeria became independent in 1962. In Angola, a Portuguese colony at the time, thousands of Portuguese soldiers and civilians were killed by Angolan villagers in March 1961. Frantz Fanon, *The Wretched of the Earth*, New York: Grove Weidenfeld, 1965, p. 134. In the Mau Mau rebellion in Kenya, thousands of Kenyan civilians and a smaller number (32) of British were killed, because of their collaboration with the colonialist United Kingdom. John Saville, "Rebellion of the Powerless", *Socialist Review*, No. 157, October 1992, p. 24-25, reproduced verbatim at: Marxists' Internet Archive, 4.7.2010, <https://www.marxists.org/archive/saville/1992/10/maumau.htm> (date accessed: 30.5.2024).

58 Hamdi Yıldız, "İsrail Ordusu Gazze'de Yerinden Edilmiş İnsanların Konvoyunu Vurdu: En Az 70 Kişi Öldü", *Anadolu Agency*, 13.10.2023,

59 Gabrielle Tétrault-Farber, "Despite Biden's Doubts, Humanitarian Agencies Consider Gaza

went even further and stated that the figures given by the Palestinian Ministry of Health in previous attacks were also reliable.<sup>60</sup> On the other hand, a mechanism of lies that Israel has botched has been working non-stop since the Al-Aqsa Flood. We stated above that some of the civilian deaths during the operation were due to the Israeli army's attacks and indiscriminate firing. In November 2023, Israeli newspaper Yedioth Ahronoth reported widespread claims that Israel implemented the Hannibal Protocol—a military approach allowing for the killing of its own civilians and soldiers, if necessary, to prevent capture at all costs. Moreover, the images of the music festival attacked by Hamas forces on October 7 had also raised suspicions that the weapons in the hands of Palestinians could not have caused such destruction. The Israeli army had acknowledged in a statement in December 2023 that such “friendly fire” incidents may have occurred, but had rejected the request for a detailed investigation. Later, in February, this time Haaretz newspaper put forward new evidence, and the entire world understood that a significant portion of civilian deaths were the work of the Zionist army. Lastly, the previous defense minister of Israel, Yoav Gallant, admitted that they used the Hannibal Protocol during their response to the Al Aqsa Flood operation.<sup>61</sup>

Another lie was the claim of “40 babies whose heads were cut off”. The Israeli army and a Zionist organization called ZAKA claimed that Palestinian militants raided a kibbutz and cut off the heads of around forty babies. US President Biden also said that he saw the pictures of beheaded babies, in order to ensure that the world took the claim seriously. However, on October 12, 2023, the White House backtracked announcing that the president had seen nothing of the sort.<sup>62</sup> Since the US had previously hidden behind the claim that there were chemical weapons in Iraq to invade the entire country, causing the deaths of a million people, it can of course be considered normal that Biden's “little” lie this time was not a big deal. A long list of additional examples exists. One concerns Shani Louk, who, according to Israeli President Herzog, was beheaded at the music festival. However her family says that their daughter's physical integrity was not harmed when they received her body 7 months later.

#### 4. Course of action

Historically, the failure to establish diplomatic relations between the US' Arab allies (except for Egypt and Jordan) and Israel, which is almost an extension of the US in West Asia, was a significant problem for the US. The post-2017 process, which we briefly mentioned in the previous sections, was an important step taken to solve this problem and to make the bloc that would stand by imperialism in the region a single entity. With this new bloc established through the Abrahamic Accords, the

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Toll Reliable”, *Reuters*, 28.10.2023, <https://www.reuters.com/world/middle-east/despite-bidens-doubts-humanitarian-agencies-consider-gaza-toll-reliable-2023-10-27/> (date accessed: 31.3.2024).

60 “UN says Gaza Health Ministry Death Tolls in Previous Wars ‘Credible’”, *Al Jazeera*, 27.10.2023, 61 Gallant's speech to Israel's Channel 12, on 6 February 2025.

62 “White House Walks Back Biden's Claim He Saw Children Beheaded by Hamas”, *Al Jazeera*, 12.10.2024, <https://www.aljazeera.com/news/2023/10/12/white-house-walks-back-bidens-claim-he-saw-children-beheaded-by-hamas> (date accessed: 3.5.2024).

US aimed to limit the area of action of Russia and Iran in the region and to close the region's doors to China's Belt and Road Project as much as possible. However, the centrifugal forces resulting from the weakening of imperialism occasionally cause minor deviations in this equation; for example, Iran and Saudi Arabia could sit at the table under China's mediation. Nevertheless, imperialism's project to close ranks and silence dissenting voices in West Asia has not yet failed. The alternative line of Türkiye and Qatar (clustered around the Muslim Brotherhood) is being dispersed through various methods and these two countries are being largely included in the "grand alliance."

From this broad perspective, it is clear that Israel is an important and central element of the new confrontation in West Asia. Through normalization agreements, Israel dreamed of a future in which it would increase its trade in the region, gain new security means outside the power of its army equipped with US support, against rivals such as Iran, and be able to market the natural gas it stole from the Palestinians to Europe without incurring great costs.

The Al-Aqsa Flood dealt a significant blow to these dreams. Although an alliance with Israel is not something that is undesirable for regional powers today, it is more costly. Israel's legitimacy has suffered a serious blow all over the world.

Moreover, Israel could not win a victory against Palestinians. It killed more than 60.000 of them, spent at least 22 billion dollars, but did not win. Israel could not destroy Hamas. Hamas lost 6 or 7, maybe 10 thousand of its 25.000 fighters. 15.000 is still remaining, and many others joined its ranks during the war. Hamas also still has weapons, and is still producing some even by using the unexploded materials that Israel used. Eliminating Hamas, as well as Islamic Jihad and the PFLP, was a main target of Israel's assaults. It failed. Israel could not rescue the hostages, a primary objective of its attacks. It failed. Israel could not destroy the tunnel network of Gaza, another important goal of its operations. It failed. Let's be clear, Trump threatened to intervene in the war, and Netanyahu's wheelspin stopped.

But the West Bank is a new target for Israel. During February 2025, it intensified its attacks on the West Bank, raided homes, and destroyed critical infrastructure. It forced the Palestinians in Tulkarem, Jenin and Nur Shams to evacuate the camps, displacing around 40,000 people from their homes. Defense Minister Israel Katz declared that the Israeli army had "evacuated" these camps and had been ordered to remain there "to prevent the return of Palestinian residents."<sup>63</sup> A new textbook example of ethnic cleansing, which must definitely be stopped.

Furthermore, Trump's intervention began with a threat, and resumed with impudence. On February 5, 2025, during Netanyahu's visit to the White House, he declared his "plan" for Gaza: the expulsion of Palestinians from Gaza, a US takeover of the strip, and turning it into "a riviera" of the "Middle East". A plan, bringing again to the table what Zionists failed to conclude: the ethnic cleansing of Palestinians, which must definitely be stopped.

But how? First, let us draw attention to a point that can be the subject of another

<sup>63</sup> Al Jazeera, "Israel Expands West Bank Offensive, says Troops to Remain 'For Next Year'", 23.02.2025

article. The liberation of the Palestinian people means guaranteeing a freedom that applies for all Palestinians, Arab and Jewish. The settler colonialism, ethnic cleansing and genocide are not characteristics that Israel acquired later. They are its innate, essential characteristics. Abandoning them would mean its annihilation. This demonstrates the futility of the search for a “two-state solution” that envisages living together with Israel. Palestinians gained nothing from Egyptian leader Anwar Sadat’s speech in the Knesset, the Israeli parliament, in 1977, from his handshake with the Zionists at Camp David a year later, from the Palestine Liberation Organization’s declaration of recognition of the two-state solution in 1989, and from the Oslo process<sup>64</sup> orchestrated under the auspices of imperialism in 1993. They will not be able to achieve freedom with new initiatives of this kind as long as Israel is not destroyed. Therefore, what we mean by getting rid of the scourge of Zionism is not a return to the pre-October 7 period or a “two-state solution” achieved through a new “solution process,” but the establishment of a free Palestine from river to sea.

We must admit that in the face of the ongoing genocide in Palestine, Türkiye, a NATO member, and Qatar, which hosts the largest US base in the region, are following a line that is far removed from the resistance axis powers, . A line that never challenges the framework drawn for them by imperialism. As we have reminded in previous titles, in Türkiye, Erdoğan and his party, the AKP, first threw the Mavi Marmara case under the bus, and more recently, in parallel with the Abraham Accords, went into a new rapprochement with Israel. After exploiting the feelings of the working masses in Türkiye, who are friends of the Palestinian people, with their anti-Israel rhetoric for a long time, they began initiatives to turn this rapprochement into cash, primarily by transferring natural gas stolen from the Palestinians to Europe,. Israeli President Herzog visited Türkiye, and then Netanyahu the butcher was also invited. If he had not fallen ill, Netanyahu the butcher would have been hosted in Türkiye in September 2023. When the flood began, calls for moderation immediately rose from the despotic regime in Türkiye. After the Zionist massacre began, the tyranny took no steps other than some diplomatic talks to stop it. It was content with only condemning Israel, reiterating that Hamas was not a terrorist organization, and occasionally asserting that its position could help build a bridge between Israel and Palestine to prevent civilian casualties. Although it was known that the Incirlik Base in Türkiye provided services to the US, which was a partner in the massacre, and that the radar at the Kürecik NATO Base was tasked with protecting Israel from Iran, the tyrannical regime made no arrangements regarding these. In fact, it gave the imperialists a gift by approving Sweden’s NATO membership on October 23. It did not stop the transportation of Azerbaijani oil through Turkish territory to provide the majority of Israel’s oil needs. It turned a deaf ear to calls to cut off trade with Israel for months, arguing that this was impossible. While the massacre continued in October and November 2023, around 400 cargo ships were sent from Türkiye to the ports of Haifa and Ashdod, and goods were also transported to Israel by air on a daily basis. Israel was able to buy significant amounts of steel and

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<sup>64</sup> Al Jazeera, “Israel Expands West Bank Offensive, says Troops to Remain ‘For Next Year’”, 23.02.2025

cement from Türkiye. Zorlu Holding continued to supply electricity to Israel and received awards from Erdoğan for doing so. However, as public pressure increased and the AKP suffered a significant defeat in local elections in March 2024, the tyrannical regime was forced to announce the cutting off of certain items of trade in April, followed by a complete cutoff in May. Similarly, after months of arguing that intervention in the case filed by South Africa was impossible, it ultimately intervened—once again under pressure..

Qatar has a special importance regarding the Palestinian issue because it hosts the political wing of Hamas. This situation results in Qatar being at the forefront of the ceasefire negotiations. Qatar's "soft power" apparatus, Al Jazeera, plays an important role in informing the world about what is happening to the Palestinian people. Although the channel's operations in Israel were terminated for this reason, its reporters in Gaza continue to broadcast day and night, documenting the Zionist genocide despite all the challenges.<sup>65</sup> However, one should not have any illusions about Qatar's role. The country has become an outpost for the US against Iran. Hamas's departure from Syria in 2012 and its relocation to Qatar were made possible with the approval given by the US in the background. From the US perspective, it was more desirable for the civilian wing of Hamas to be in a place under its control rather than in a country like Syria or Iran. Qatar had no problems with US bases throughout the genocide, and there was no decline in its trade with Israel (although it has had no diplomatic relations with Israel since 2009). Just as Türkiye gifted Sweden's NATO membership to imperialists supporting the genocide, Qatar reached an agreement in January 2024 with the US, to extend American use of the Al Udeid Air Base (which is also occasionally used by the UK) for another ten years.<sup>66</sup>

It can be said that in the upcoming process, these two former Muslim Brotherhood supporter countries will be given new roles by US imperialism. The relocation of Hamas from Qatar to Türkiye, an issue that has been in discussion for some time, will again be a US/NATO-driven project if it takes place. Indeed, the US is not satisfied with Qatar's performance in containing Hamas. In order to understand what other consequences the move to Türkiye will have, it is necessary to look at the alleged meeting Hakan Fidan had with the Hamas civilian wing in Doha in February 2025?. In this meeting, Fidan suggested that Hamas accept Israel's 67 borders and the Hamas representative stated that they were inclined to do so. AKP members had previously suggested that Hamas abandon armed resistance. As a result, it is easy to say that these Türkiye and Qatar are not forces that can be trusted for the freedom of the Palestinian people.

As stated in previous chapters, military support for the Palestinian resistance

65 The case of Al Jazeera reporter Wael Al Dahdouh deserves special mention here. After his wife and children were killed in one of the first Israeli attacks on the Nusayrat camp, he returned to his post in a very short time to report the Zionist massacre to the world. Shortly afterwards, his eldest son, also a journalist, was killed by Israel. Shireen Abu Akleh was another Al Jazeera reporter killed by Israeli forces while on duty to document the crimes of Zionism in recent years.

66 Alex Marquardt and Natasha Bertrand, "US Quietly Reaches Agreement with Qatar to Keep Operating Largest Military Base in Middle East", *CNN*, 2.1.2024, <https://edition.cnn.com/2024/01/02/politics/us-qatar-agreement-largest-base-middle-east/index.html> (date accessed: 3.5.2024)

organizations came only from the Axis of Resistance. Although Iran and its allies were unable to enter into an all-out war, they ensured that the genocide in Palestine would have significant costs for both the Zionists and the imperialists. It is useful to reiterate our position on the Axis of Resistance here, as illusions about the positions of the armed and political forces of this bloc are more common than before within the socialist left. First of all, let us state that whether it is Hamas, Hezbollah, Ansarullah or Iran against imperialism, their victory would please us. We have repeatedly expressed this in this article and before. However, we have also emphasized that although these organizations are currently waging a very solid struggle against imperialism in the region, their programs will not be sufficient to ultimately liberate the working people. An important reason for this is that the organizations within the Axis of Resistance lack a program that can mobilize their nations in the strongest way against imperialism and Zionism and that can unite their struggle with that of workers and laborers in the centers of imperialism who are fighting their own bourgeoisie for the ultimate victory.

In one way or another, they accept private ownership of the means of production, prioritize a minority with privileges within their own society and the preservation of these privileges. They put the cost of liberation on the working people, thus weakening the struggle. Moreover, they want to put the decaying capitalism in a straitjacket on a people who are paying a heavy price in their struggle for freedom from colonial rule. They weaken the front by deliberately excluding those who will play a key role in the liberation struggle, especially women and people of different sects and religions. Although their solidarity practices that transcend borders are not limited to other Islamists, their target for ultimate liberation is the sect, or at best the ummah. It is clear that this sum points to a group that is far behind proletarian internationalism.

Therefore, we have come to advocate that the proletariat should take the leadership of these nations, including Palestine, for the victory of the working people of Western Asia. What socialists need to do is (1) to stay away from the increasingly popular postcolonial approach, which places the working class among the privileged layers, and also from pacifism that paralyzes the masses, (2) to put proletarian military politics into practice, (3) to struggle against the same target with the tactics of a united military front together with other resistance elements, without mixing flags, and do the best to gain the leadership of the nation in the meantime. The Palestinian left, especially the PFLP, has passed and is still passing an important test in this sense, despite all its weaknesses. Unlike other resistance organizations, it lacks a direct connection to a state (e.g. Iran) or a union (e.g. the EU), but still has managed to maintain its armed presence in Gaza and remain effective in all other parts of Palestine. The duty of Turkish socialists is to cooperate and be in solidarity with Palestinian socialists for victory, without hesitating to offer open and honest criticism when necessary. But it must be a real solidarity, beyond chanting PFLP slogans in the faces of Islamist masses they stand side by side in the demonstrations.

The Zionist genocide has significant effects on the young sections of the Jewish people, especially those living outside the 48 territories. As we have seen in previous titles, the Jews of the United States are standing up to the Zionist genocide

with significant organization and courage. It's time to come to terms with Zionism, which has plagued the Jewish people. More discussions should be held with these advanced sections of the Jewish people, and more efforts should be made to win them over to Marxism. It is clear that this is an internationalist duty.

It is also time to advance the boycott, sanctions and divestment (BDS) campaigns targeting Israel, as well as to stand in solidarity with the Palestinian people. Today, many companies in Türkiye are doing trade with Israel and supporting the genocide. Unfortunately, there are only a few organizations that are trying to convey this information to the working people through limited channels. Even while Israel is committing genocide today, it is still able to sponsor art events through its institution called ARTISRAEL. Turkish universities continue to cooperate with Israeli higher education institutions. Cutting off these channels of influence should be a priority in the struggle against Zionism and imperialism. Furthermore, we have to explain to the working masses that Palestine is a natural ally of them and the bourgeois class is Israel's.

In Türkiye, too, supporting the Palestinian people's struggle for liberation is not independent of the struggle to overthrow the bourgeois order. Today, bourgeois parties have buried all kinds of admiration for Israel due to the Zionist genocide. However, from the ruling AKP to the mainstream opposition CHP, all of them are on Israel's side. If its commitment to international trade has prevented the AKP from cutting off trade today, the same will happen tomorrow under the CHP government. When a people is suffering genocide, the most effective way to impose sanctions on the perpetrators is not to leave it to the mercy of the bourgeoisie or politicians who are themselves merchants, but to have a foreign trade monopoly under workers' control. If its commitment to imperialist unions has resulted in the AKP's failure to close Incirlik and Kürecik bases today, the same will happen tomorrow under the CHP government. The way to close these bases and withdraw from NATO, which protects Israel, is to establish a workers' government.



# Revolution and Workers

George Habash

**On the first night of May 1970, more than three thousand citizens gathered to celebrate International Workers' Day in a large ceremony organised by the Popular Front for the Liberation of Palestine in the Awdat camp in Jabal al-Hussein. In this ceremony, comrade doctor George Habash addressed the crowd of workers and citizens.**

**The central information department of the Popular Front for the Liberation of Palestine presents the full text of this speech to the citizens.**

**Central Information Department**

**May 10, 1970**

Worker comrades, fellow citizens,

We hold this ceremony to celebrate May Day. Some may, and indeed do, ask us questions such as "what do you have to do with workers? What does guerilla work have to do with workers? What does the Popular Front for the Liberation of Palestine have to do with workers?". The Popular Front for the Liberation of Palestine celebrates this holiday, the holiday of labour, in accordance with the political line and vision for the liberation fight. We celebrate the holiday of labour because we believe that the working class is the vanguard of the revolution of liberation. And only can its theory, stance and ideas seal off the victory and liberation. That is why

celebrate May Day.

Fellow citizens! Are the words we uttered, wrote and said that, first of all, the working class is the subject of revolution, and second, that one cannot obtain liberation without basing itself on workers' theory, stance and ideas, are these abstract thoughts for us? Are these abstract words? Are they mere extracts from books that we exploit either for self-indulgence or for lulling the masses into false hopes?

I here declare on behalf of the Popular Front for the Liberation of Palestine, and of its fighters, political organization and central committee that those are not rhetorical expressions, but scientific and revolutionary facts that we utterly believe in. They have manifested themselves firstly in the grand world revolutions, secondly, in our experience in Palestine, and thirdly, in the contemporary situation.

Why is the working class the subject of revolution?

Why is it the vanguard of revolution?

Why do we assert that only its theory can lead us to the victory of revolution?

## **What is revolution?**

Revolution may have hundreds of definitions, but its essence is immutable: the exploited versus the exploiter; the oppressed versus the oppressor; the poor and miserable versus those who cause them to suffer. Any historical revolution has witnessed these inevitable conflicts.

All historical revolutions have taken place against national or class-based oppression. If a revolution is of those characteristics, then how should we approach the Palestinian revolution? Who rises up against whom? Who are the exploited and exploiters? The scenery before us, brothers and sisters, leaves no doubt: The Jewish capitalists, who have been emboldened by the late 19<sup>th</sup> century global capitalist expansion and have formed alliances within world capitalism, conceived a project aimed at enhancing their capital accumulation and retaining their grip over the people and poor classes, leveraging the anti-Semitic mass persecution. Thus, it planned to establish a Zionist Jewish state in Palestine and continued its activities until 1948, when it established the state of Israel, our enemy, in our homeland, relying on the power of imperialism.

There is a class in our society that just metes out the leftovers to our people in order that they cannot break their chains and revolt against exploitation and oppression, and that the interests and political influence of Israel, Zionism and imperialism remain intact. That is the reactionary capitalist class, which is responsible for our people and movement having their hands tied.

In the war for the liberation of Palestine, the picture is clear: Israel, Zionism, imperialism and Arab reaction, that Israeli, Zionist, imperialist, reactionary, quadruple alliance that exploits our people and the sons of our people.

Fellow brothers and sisters:

## **Who stands against that exploitative alliance?**

Those are the Palestinian masses expelled and exiled from their homeland, alongside Arabs who may face the same threat, and the working class as the most exploited segment of the society. The former is the reason why that class is the fire and torch of the revolution.

That is why we say that the working class is the subject of revolution. Why the working class? As I just mentioned, the working class is the most exploited segment of society. It is an entirely unpropertied class that owns neither capital and means of production nor land and machines. What they just have are their arms, bodies and sweat. Selling their labour power at a derisory rate is the only way to survive under the brutal working conditions. That class experiencing exploitation and oppression every day is the subject and fire of the revolution, and the only one that can lead it.

## **The subject and vanguard of revolution**

The Palestinians who account for 85% of the café and hotel workers and shoeshiners in Tel Aviv and who are called almost every time by the racist epithet “Arabim hemur” (Arab donkey) are undoubtedly the subject and vanguard of revolution.

Our daughters and sons in Gaza, who are deprived of land and capital, deprived of anything but their arms and who desperately seek an opportunity to sell their labor power to gain their daily bread, are also the subject and vanguard of revolution.

Our stateless sons and daughters living and toiling in the East Bank<sup>1</sup> [...] and camps, who have no income, capital and means of production, are the subject and vanguard of revolution.

If revolution is the one in which the oppressed and exploited topple the oppressor and exploiter, if the revolution will change the reality shaped by poverty and misery, then the working class is its subject because it is the most misery-stricken part of society. It is, however, not enough to reiterate that. The working class has already been the integral subject of revolution for fifty years in Arab Palestine. They are those who have been martyred in the revolution of 1936. They are those who have never shirked to shed their blood for the homeland. It is then not enough to say that it is the subject of revolution. We need to emphasize that it is also the vanguard.

Workers were the subject of the revolution of ‘36.<sup>3</sup> But the leaders of the revolution were from capitalist and feudal families who were ready to collude with British imperialism at the first opportunity to sell out the revolution. All they were con-

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<sup>1</sup> Jordan (translator’s note)

<sup>2</sup> Illegible text (translator’s note)

<sup>3</sup> The uprising in Palestine under the British mandate between 1936 and 1939, which included a tax boycott and a general strike, gradually increased in that period and upset the social balance in Palestine, targeting Zionist immigration and the favouritism of Zionists by the British mandate, and was, in fact, the first intifada of Palestine (translator’s note).

cerned with was reserving a place for themselves in the puppet government. That is why the revolution failed.

The subject of the revolution was the working class, but the leadership was on the side of the reactionary class, the capitalist and feudal classes. We know the families that led the revolution, so the revolution ended in failure. The revolution failed once again after '36 when it was this time led by the national bourgeois and petty bourgeois, respectively. We therefore need to make the working class take the leadership. And we know that it cannot happen spontaneously.

Hence, to realize this goal, no matter how long it takes, we will persevere to organize and mobilize the masses, and sacrifice our sweat, blood and tears.

### **Unity of ranks and the value of leadership**

Worker comrades:

You should know that the leadership has a deep value. Those aspiring to lead must be geared with the required skills. The working class is obviously the most prospective candidate to lead the revolution due to its poverty, misery and exploitation which already turns it into the main subject of the revolution. However, this will not turn into reality unless the following three conditions are met:

First, working class should be conscious of its own materiality and historical role. It needs to be aware of who it is and of what role it can play. The working class leaders should painstakingly work to improve the class consciousness until workers are fully ready to confront the tendencies that may divert them from the revolutionary path and that may disguise the exploitation. Organizing the workers should be built on that.

What can a worker alone do? Or ten workers? Or just one trade union? The working class organized and mobilized nationwide, in alliance with the Arab and international working class, however, it can obtain the ability to lead the revolution. There is no easy way to do that. The working class cannot undertake the leadership without paying a price and this price is the fatigue, mobilization, struggle and sacrifice.

Because it is weak owing to still being outnumbered in a backward country, the working class should acknowledge that the tortuous path to leadership cannot be traversed without shedding sweat and blood alongside expending huge efforts to develop class consciousness, get organized, and wage a true struggle.

It must be also stressed that it is impossible to win the victory if the revolution lacks the theory, mobilization methods, stance and ideas of the working class. Some may ask: Does the working class have its own theory? Does it have its own ideas? Does it have a cause? Answer: Yes. It is doubtless that the working class has a certain and specific perspective regarding the struggle and its methods which emerges out of its daily experience of oppression, poverty and misery. So is it when it comes to getting organized? It is impossible for the revolution to reach victory without relying on the working class' theory and militancy. The working class provides us with a cleaner and more scientific vision. Also does it a liberation strategy with a

higher mobilization capacity alongside a method of struggle, and a specific form of organization. These are the concepts of the working class. What do we mean by these? And what is the working class' theory for the struggle for liberation?

The working class is undoubtedly identifying who its enemies are here and saying that the struggle for liberation is at the same time a national struggle and a class struggle. We therefore cannot be content with saying that the only enemies we face in this struggle are Israel, or Israel and Zionism, or Israel and imperialism. [The working class] goes even further with clarity and scientificity and says that here, in our homeland, in addition to Israel, Zionism and imperialism, there are hostile forces linked to colonialism and Zionism, they are our enemies. We should be conscious of that reality. Our struggle otherwise has no chance to succeed. When the working class and the people learn this truth, then it will not be possible to stab the revolution in the back and stop it, as was done in '36 and '48.

They preach to us that this is a national struggle, that we face Israel now, and that we are obliged to muster all forces under the same banner in the fight against Israel, so it is an obligation to keep the ranks united. We think these are well-said words. Well then, how can we be in the same ranks? The exploiter and exploited cannot stand in the same ranks? There cannot be any unity between our martyrs and the working class living in the occupied territories, and those who pay a hundred thousand dinars for a bridal dress.

How can the home front be strong as exploitation exists, as the exploiter and exploited still exist?

Claiming that there is no excruciating exploitation or a huge gap between classes in our country is non-scientific, deceptive and null. We witness tens of examples of severe exploitation every day that speak themselves to the impossibility of the aforementioned unity. A true unity of ranks thus entails the leadership of the working class, which had already abolished the class-based exploitation and calls for the unity of ranks against the national enemy.

When the workers took 12,000 dinars out of the 72,000 dinars, the world jumped up and down:

No exploitation. How can there be no exploitation? At the University of Jordan, a debate once took place in one of the board meetings. The first item on the agenda was the allocations of the board and its members in the form of *telhunt*<sup>4</sup> and *tel*<sup>5</sup>, etc. While discussing these allocations of the board of directors, there was a simple official who had worked at the university for twenty years and was paid, I do not remember exactly, 12 or 14 dinars. He submitted a petition saying that he was looking after seven or eight children and that he wanted his salary to be raised to 18 dinars. They said that this was not possible, because if the aforementioned official's request was granted, all employees would submit the same request. They peddle the narrative of "no exploitation." I want to conclude this conversation with them

<sup>4</sup> التلهوني

<sup>5</sup> التل

right away. If there is no exploitation and class difference and if we all are “same”, let’s give them a chance to prove those arguments. What to do is so simple: They will move to the refugee camps and leave their palaces in Jabal al-Huseyn, Jabal al-Lweibdeh and Amman to the poor living in those camps. When the people of the camps go to the palaces, and the people of the palaces come to the camps, then we are ready to accept their unity in the ranks, but all this is empty talk. They all try to distort the truth. The facts tell us that exploitation exists, that the working class is the exploited class, and therefore its pure unity must also have a working class thought. The working class leads the unity of the ranks between all the classes in the revolution and if they are really concerned with establishing the unity of the ranks and everyone’s equality, let them donate their extra money to the guerilla forces. We already know how negligible the capitalist class’ pecuniary contribution to the cause is. We must be clear about it. Now let’s visit the guerilla bases and ask our fighters: you, comrade! Whose son or daughter are you? Who is your family? You will see that none of them come from the capitalist class, but from within workers and peasants. So they are entitled to say that:

The Palestinian liberation struggle is a national struggle, but it is also a class struggle. When we say this, we mean that there is a reactionary feudal capitalist class whose interests are linked to colonialism. This class cannot be one of the revolutionary forces, because, as you undoubtedly know, the revolution is against imperialism, against America. Then, if [a capitalist] has a branch of an American automobile company, an American insurance company, or an American bank, is it conceivable that after imperialism has been defeated, he will stand by the revolution? We want to define this clearly: There is a class, and this class constitutes a small part of society. This class has millions, not through sweat and toil, but because they are the brokers of American capitalism, because they own agents of foreign companies, because they are traitors and puppets. This class is counter-revolutionary. Ours is a national and, at the same time, a class struggle, against national oppression, Israel, Zionism and American imperialism, but also against the feudal capitalist big bourgeois class, whose interests are linked to colonialism and imperialism.

I would like to tell you that this reactionary capitalist class does not exceed 1 percent, and even if it is expanded, it does not exceed 10 percent. Then there remain 90 percent of our people whose interests are not bound up with colonialism and imperialism and who are, therefore, not enemies of the revolution but one of its forces. But if we say that the whole of our people are in favour of liberation (and this is true), then we must say that the mobilisation of this 90% must take place under the leadership of the working class. And every honourable man, every honourable intellectual, lawyer, doctor or engineer (here I mean the honourable national petty bourgeoisie) should be proud of the leadership of the working class. Here the national mobilisation is correct, here we have actually mobilised ninety percent of our masses, under the leadership of the working class, on the basis of working class theory and working class concepts, we have created the unity of the ranks in the face of national oppression.

This is one of the many examples we have to observe every day. All these examples point to the difference between the attitude of the working class and the national attitude which does not lead and does not put forward. The working class is radical in everything. Not only does it want to put forward the issues precisely and clearly, but it also wants the revolutionary mobilisation to be completed. In other words, there are always working class concepts and other concepts.

Take, for example, the question of who the enemy is. With regard to this concept, the working class not only says that the enemy is Israel, Zionism and imperialism, but it also adds Arab reaction as part of the enemy. The working class is very clear about the method of struggle and does not trust in the method of political struggle, i.e. protests, enthusiasm, demonstrations and similar forms of political struggle and that through them it can achieve liberation. This class, which suffers oppression every day, cannot wait for the Arab armies to liberate Palestine. Why can't it? Because it lives with injustice every day and wants to get rid of this injustice once and for all. What does the working class say when it puts forward the method of people's liberation war? This class says, we are the oppressed, we want to take up arms, we want to fight, the enemy is stronger than us and nothing keeps us from sacrificing a year, two years, or even ten years. And I say, without any doubt, we are ready to fight for a thousand years until the working class achieves victory. We do not say this only because this class is the working class. It is not a question of words. The working class wants to put them forward because it is oppressed, it wants to get rid of this oppression. It has nothing to lose, so it is really ready to fight.

### **Workers and the question of organisation**

The concepts put forward by the Popular Front are not sophisticated, abstract concepts hanging in the air: They are absolutely clear concepts of the radical working class, which wants to put the matter clearly, which wants to determine the nature of its line, its method of mobilisation and also of organisation. The working class also has concepts in its method of organisation. It is an exploited, enslaved, oppressed class. Therefore, it wants to oppose this exploitation in its organisation. That is why there are no high-level leaders or bureaucratic leaders in the workers' organisation. Workers rebel against oppression, cruelty and slavery. Therefore, their organisation is also iron, based on relations of democratic camaraderie.

The working class has its own concepts for everything: In contemplation, in the analysis of the struggle, in defining the enemy, in determining the method of mobilisation, in defining the slogan of the people's liberation war, in the nature of its organisation and in its political attitudes.

This became completely clear on 10 February 1970. What did the working class and all the poor masses say that day? How did they all feel? Not because they were more patriotic than others, but because they lived in exceptional circumstances.

On 10 February 1970, each of them must have said to himself or herself, "I was expelled from my country and lived for twenty years in camps, enduring conditions of poverty and disease, inadequate medical care and unemployment." "I lost my first child because I could not find medicine, and for the first time I have something called guerrilla activity in front of me, and you want to kill this hope in me?" These poor masses, who have lived under persecution for decades, were stabbed in 1936, stabbed in 1948, and for twenty years lived a life of shame and poverty in camps. Seeing in guerrilla activity a glimmer of hope for liberation, these masses were determined on 10 February to fight to the death in every street of Amman to defend and preserve the revolution. This is the attitude of the working class.

We have not come here to applaud, but to understand and put forward our issues with complete clarity. I want to say that only the working class can lead us. That is why I want to say that the farmer, the student, the lawyer and the shopkeeper, whose interests are not aligned with colonialism but with the interests of their people, must support and stand with the leadership of the working class. This support is a consequence of the fact that the working class is the only class which, in its conditions and daily life, can achieve victory. We can see the attitude of the working class in the demonstrations against the visit of the US Deputy Secretary of State Joseph Sisco. The difference between the average nationalist attitude and the attitude of the working class, which had made the citizens point to it and recognise it as their leader, was clear. This attitude, which we aspire to, is the attitude of the working class and the theory of the working class. The workers, then, are the substance and leaders of the revolution. The attitude of the workers is the only theory on the basis of which the revolution can triumph.

I would like to emphasise one last point. The working class, even in its hardness, is scientific because of its position, because it is hungry for victory. This real desire for victory makes it necessary for it to see the struggle in a clear and scientific way. Therefore, the leadership of the working class of the Palestinian and Arab masses cannot be an adventurous and unscientific leadership. The working class fights for its own leadership in the war, and once it has taken the leadership position, it will be eager to mobilise all national classes for the liberation revolution. This leadership therefore becomes the leadership of the peasants, of the working class itself and of the national petty bourgeoisie. It is therefore really eager to achieve victory over its real enemy by fully mobilising all the forces of the revolution.

And also the working class is as scientific as it is fierce in its revolutionary militancy, because it wants to end exploitation and achieve victory.

Three issues before the masses

Brothers and sisters, to the extent that the outlines of the liberation struggle must be clear, the issues of the revolution from time to time and the problems it faces in every period must also be clear in our minds. In this period, the working class and the masses of the people who want to achieve victory must understand three fundamental issues:

Firstly: the question of the continuation of the guerrilla war against reaction.

Secondly: The question of united command.

Third: Conflicts in the occupied territories and their intensification.

For the victory of the revolution, these three issues must be understood by the masses and monitored daily.

With regard to the first issue that the Popular Front wants to clarify, this ceasefire that took place after 10 February is a ceasefire mined by the reactionary leadership itself, which is in a state of silence, but is plotting to target and liquidate the revolution. We say that only through the masses and their consciousness of these conspiracies can we thwart them, and that since 10 February the leadership has formally withdrawn and has spoken softly, promoting unity between guerrilla activity and the army. But this is not the reality and they can no longer deceive us. We want to use our reason and judge concretely, as we see it: When we examine the facts, we see that since 10 February the leadership has been making dastardly plans for the guerrilla movement. The Popular Front and another guerrilla organisation saw this and exposed the plan prepared by the reactionary leadership for the Westerners to attack the guerrilla movement. There is no time to go into details here.

The [Jordanian] administration created a special apparatus outside the army, security forces, intelligence and military intelligence. It has allocated a very high special budget to it and has divided this apparatus into departments and branches. These are all plans that point to a real evil and hostility to guerrilla activity. We do not say these words to insult the leadership, on the contrary, we know who is in charge of this apparatus, to which order this apparatus is subordinated, its basic elements, each section, each unit, its work. The head of this apparatus is the chief Abdulkarim Omar, who is linked to Prince Ali bin Nayef, and I have in front of me a list with the names of his main assistants. These people were working on a big plan and some of them are now in the guerrilla branch, some in the media and political activities. In other words, they want to be revolutionaries working along populist lines(!) This branch specialises in this. Some of you have undoubtedly seen the leaflets signed in the name of the "Revolutionary Consciousness Committee." If you read these leaflets, you will see the poison that these people spread among the ranks of the people.

This branch constantly raised suspicions about guerrilla activity and incited hatred between Palestine and Jordan in order to increase the army's hatred of guerrilla action. There was another branch devoted to monitoring guerrilla bases, the number of guerrillas in each base and the weapons in them. In one unit, for example, there is a retired officer and twenty deputies whose task is to report any movement of guerrillas and to inspect all bases. There is another branch for assassinations and smuggling. This plan is based on recruiting people in the name of the guerrilla in order to attack people and harm guerrilla activity, and then they make a fuss about guerrilla activity and use this as a justification for attacking guerrilla activity. I would like to mention only the headings of their confessions; assassinations followed by arrests, spreading rumours and false news, striking fear into the hearts of the people, arresting people in the name of armed struggle, monitoring the army and tracking the movements and connections of guerrilla organisations and citizens,

monitoring the resistance movement and the location of organisations belonging to guerrilla movements, to know their bases and the number of their members, to distribute weapons to the supporters of the administration, to deepen the terror, to create conflicts between the inhabitants of the two sides, to write slogans on the walls, to issue bulletins in the name of the “Revolutionary Consciousness Committee”, to print and distribute posters, to report daily all the information obtained by the member or recruiter. These were the most important points that the reactionary leadership wanted to give to its men. I can assure you that this is a simple copy of the reaction and its father, the CIA. We know the role of institutions and companies in this country: For example, what is the commercial organisation above the Bank of England, what does it do? We know the building behind the Orthodox Club in Jabal Amman [neighbourhood] and what it does, and we know all the hideouts in Jabal Amman and in Amman and what they do.

Recently, the Popular Front arrested groups that were directly co-operating with Israel. The purpose of this co-operation was to smuggle people from Gaza and the West Bank to Jordan, because Israel’s goal is to get rid of the largest number of our citizens. There is a person who facilitates this task, he is one of the emirs and his name is Hussein bin Zaid or Zaid bin Hussein, and he receives 9 dinars for every citizen who escapes from the West Bank or the Gaza Strip, and about 80-100 citizens a week escape in this way.

### **Fight against reaction**

We return to our first topic. We, the masses and the working class, have a question of safety hanging over our necks. This issue is a reaction. Reaction is always on the move, we have to judge by deeds and not by words. We, as the Popular Front, believe in nothing but actions. In this sense, all the actions of the administration still point to an attack on guerrilla activity. Against this, we say that the masses must be vigilant based on their consciousness, surround the guerrilla movement, protect it at the risk of everything, and take to the streets at a sign, until the reaction is cornered and does not return to the idea of attacking the guerrilla movement. They say that now is not the time for internal conflicts, and we say, “Who started the war of 11 April? And the 10 February war in Jordan? Who started the war in Lebanon in April ‘69? What about the March war in Lebanon?” Undoubtedly it was the reaction. It is the reactionaries who take the position of attacking and planning the attack on guerrilla activity, and we, the Popular Front for the Liberation of Palestine, say that our main desire and endeavour should be concentrated on the attack and struggle in the occupied territories. But at the same time, we will respond violently to every attempt by the reactionaries to destroy guerrilla activity.

There is one more issue that must be brought before the masses in order to make them responsible. Because the masses are responsible for the revolution. Therefore, the masses must be told the truth so that they know their duty and role in protecting the revolution. This issue is the relations between the guerrilla organisations. It is a question of consolidated leadership and of maintaining this practice and encouraging it to grow continuously. Without the masses and their vigilance, their control,

their interaction, their pursuit of the news of this practice, we cannot guarantee that this practice will win. The only condition for guaranteeing its success is that all organisations and their leaders make it clear that the masses want, firstly, the practice of a united leadership, and secondly, that through it they want it to succeed and become more advanced than before. Thirdly, the Popular Front declares that all guerrilla organisations in the Palestinian arena are national organisations in our eyes. We differ from these organisations on issues such as who the enemy is. We offer a definition, and probably not every organisation offers it. There are also differences in the form of organisation and political positions, but in spite of all this, all these organisations are national organisations. Their fighters are mostly members of the working class, whose holiday we are celebrating today. That is why we, the Popular Front, say that we, Al-Fatah, As-Saiqa (Lightning Forces), DFLP, Al-Ansar Forces, the Struggle Front and all other organisations are on the same side. We will not allow colonialism, reaction and Israel to break these ranks. There are different perspectives in these ranks, there is constant dialogue and different projects. We in the Popular Front believe that a real national unity that serves the struggle must be based on solid foundations, and we want an effective, progressive and revolutionary national unity that, once these foundations are laid, will lead to a real escalation of the struggle and political action.

We therefore consider it necessary to have a progressive political programme which constantly clarifies the strategic political baselines of the struggle. It is also necessary that relations within the united leadership be open and equal between all the organisations in order to create a favourable climate for these organisations to contribute to the revolution.

It is the duty of the masses to defend it. Some may have understood the united leadership as an integral part of the PLO, which means that we have made no use of previous experience, and we know that the old form did not give the Palestinian movement the expansion it wanted. Therefore, the united leadership must create a new form that is more advanced than the old forms, based on a political programme and an internal order, a climate of inter-organisational cooperation and programmes representing different directions of activity. Therefore, the bases and the masses, including the bases of the Popular Front, must constantly press for the development of unified command work and the success of this practice.

To say that there must be, for example, a small national assembly, a central committee or a unified leadership, without any real change in organisational and political content, is a worthless statement.

We therefore recognise that this practice belongs to the masses and therefore they must be willing for it to succeed.

Before concluding my speech, let me assure you that our view of all organisations is that they are national organisations, sons and daughters of a single people with the same problem. Undoubtedly, the basic element of the base of all organisations is the members of the working class. We must constantly establish co-operative relations with all organisations. We do not want to be utopian or dreamy: In this co-operation there will always be different points of view and masses that will lead them to more revolutionary ideas, until all political and mass organisations and all

theoretical activities adopt them. Their aim must be to support the struggle.

Every kind of consciousness-raising and response to reaction and to the question of the means of revolution must be devoted to the service of the struggle. These three issues must be supported and embraced by the masses. Therefore, brothers and sisters, Labour Day is an opportunity for us to see our tasks more clearly and to review the strategic issues we face.

***Long live the working class, the subject and leader of the revolution!***

***Long live the Palestinian revolution as part of the Arab revolution!***

*In the Tracks of Marx's Capital: Debates in Marxian Political Economy and Lessons for 21<sup>st</sup> Century Capitalism,*  
Ahmet Tonak and Sungur Savran, 2024, Palgrave Macmillan.

# The meaning of Marx in 21<sup>st</sup> century capitalism

Korkut Boratav

Two well-known economists from Turkey, Ahmet Tonak and Sungur Savran, have brought together a selection of their papers and essays presented as Chapters in their book, *In the Tracks of Marx's Capital* (Palgrave Macmillan). The authors are prominent representatives of contemporary Marxist social science in Turkey. These are papers on Marxist political economy. The scope is impressive as it extends to the boundaries of that school of thought.

An Introductory chapter is an essay on the impact of class struggles of the twentieth century on the Marxist formation of post-Marx generations. These observations, then, evolve into personal histories of the two authors and their commentary on the historical events and radical movements they observed and experienced in two countries (i.e., Turkey and the USA) during their formative years.

Moving into the body of the book, Part I is a comprehensive overview of Marx's theoretical and methodological contributions (Chapters 2 through 6) which

prepares the reader for the contributions in the following parts.

Four of the papers are co-authored by Savran and Tonak. A. Duman, Y. Karabacak and Y. Karahanogullari are co-authors of four papers by Tonak. After this theoretical introduction, the book follows the conventional agenda of Marxist political economy: Theory is used to understand the world we live in. This endeavour moves in two routes. The first route concentrates on analysing relations of distribution (exploitation) under capitalism (Part II). Called “operationalising Capital” by the authors, it concentrates on measuring surplus-value. This endeavour requires the difficult task of “translating” abstract theoretical concepts into empirical, quantitative categories.

Following *Capital I* of Marx, the exercise initially focuses on values in terms of labour time to be redefined in market prices. The theoretical divergence between the concepts is a well-known theme discussed in detail by economists elsewhere. The empirical difficulties have to be resolved practically which the authors have undertaken in Part II.

The task is essentially based on transforming Surplus-Value (S) into gross profits ( $\pi$ ) and Variable Capital (V) into wages (W). Thus, the Marxist rate of exploitation (S/V) can directly be observed and measured from the conventional distributional identity, i.e., the share of profits in value-added in terms of market prices:  $\pi / (W + \pi)$

Additional qualifications and clarifications are required: Segments of surplus-value are allocated to other “actors” of actual capitalism. The share allocated to financial capital should be distinguished from different types of “rents” emerging from appreciation of specific types of wealth (financial assets). Conceptual distinctions between realised capital gains and surplus-value have to be addressed and resolved. Implicit (or “hidden”) profits of corporate executives paid as salaries should be differentiated from the wages of labour power as a commodity. The allocation of surplus-value to unproductive workers should be clearly separated from the wages of workers directly generating surplus-value. The state is another participant in surplus-value. The costs of the social welfare state and the costs of the repressive functions of the state have to be differentiated as well.

Taken as a whole these are tasks that Marxist theoreticians rarely dare to undertake. Methodological bottlenecks must be overcome. These steps must be followed by the thankless task of moving into data collection, necessary eliminations and refinements.

Part II of the selection rewards the reader with papers on specific subjects which have overcome some of these difficulties. Chapters 5, 8 and 11 directly engage in discussing and solving the above-mentioned conceptual and methodological problems. Chapters 9 and 10 present research conclusions on relations of distribution based on relevant methodological solutions.

The second route to understanding the world we live in consists of analysing modes of operation of current capitalism, i.e., through productive forces, crises and imperialism (Part III).

Marxist political economists rarely move into an analysis of productive forces, the crucial concept determining the dynamics of the social formation. A

significant exception takes place in Chapter 13 of the present selection where the internal contradictions of the so-called post-Fordist organisation of labour under monopoly capitalism are exposed. Part III, then, moves into two areas that analyse two essential aspects of current capitalism, i.e., imperialism (Chapter 14) and crises (Chapter 15). These chapters actually correspond to a period in the history of capitalism when internal contradictions thereof were intensifying. Chapter 14 focuses on the exploitative nature of imperialism, based on surplus (value) transfers from the periphery to the metropolises of the world system.

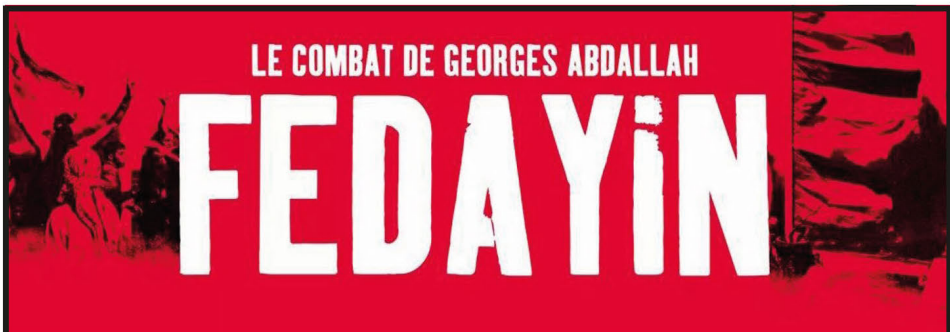
This well-known mechanism was aggravated by the implementation of neoliberalism on the periphery of the world system by Bretton Woods institutions during the past decades. The chapter merely touches upon “wars and military invasions” which had actually been realised by bloody regime change operations in the Middle East, North Africa and Western Asia since the beginning of the current century, generating destruction on the social fabrics of those societies. This moribund and aggressive phase of current imperialism deserves broader space in the present book.

Current societal destruction and violence in the periphery are implicitly covered in Chapter 15 within the context of the historic decline of capitalism. A significant turning point is the so-called “global financial crisis” of 2008–2009 which typically emerged due to the decline of the rate of profit analysed in the chapter. That particular crisis is also considered as part of a depression in the lineage of the earlier phases of the Great Depressions of the capitalist system.

Part IV of the selection is, actually, a continuation of Part I. Marx’s theory of value, central to his analysis of capitalism, is re-assessed on the basis of contributions of Piero Sraffa and his neo-Ricardian followers. Marxist economists diverged on this debate during the 1970s and 1980s. Four papers in the selection (Chapters 16–19) rigorously reject the attempt to integrate the neo-Ricardian school into the Marxist analysis of surplus-value. Due to the absence of this critical analytical component, the marriage between the neo-Ricardian school and traditional Marxism is considered to be irreconcilable. This is also a valid conclusion of the foregoing debate. On the other hand, Piero Sraffa’s contribution remains valid as an effective critique of contemporary neoclassical economics.

Sungur Savran and E. Ahmet Tonak have produced a selection of papers from their contributions to Marxist political economy some of which go as far back to half a century. Readers, I am sure will be surprised by the diversity of the themes covered. The selection’s wealth of empirical tools, findings, theoretical analysis and conclusions are impressive. They will, I am sure, contribute to the understanding of mechanisms of exploitation and oppression of actual capitalisms under which readers have been living and (hopefully) some of whom have been struggling against.

I, personally, owe Ahmet and Sungur, my two friends, colleagues and comrades of many years, a gratitude for enabling me to enjoy and learn from reading this splendid book.



The documentary film “Fedayin: George Abdallah’s Combat” by Vacarme(s) Films collective has been projected in more than 20 countries and translated into several languages. Now, it’s available on Youtube.

The documentary, originally in French, is available with English, Arabic, Farsi, Spanish, Catalan, Italian, German and Turkish subtitles (Turkish subtitles were translated by militants of the Friends of Palestine against Imperialism and Zionism).

The documentary follows the life and struggle of George Abdallah, Lebanese communist revolutionary and a supporter of Palestinian cause jailed in France for 39 years. As a revolutionary who dedicated his life since his youth to the liberation of Palestine, he fought the Zionist occupiers alongside the Popular Front for the Liberation of Palestine (PFLP) during the invasion of Lebanon by Zionist Israel. He was convicted in France, with the accusation of being one of the founders of the armed organization Lebanese Armed Revolutionary Faction, that fought the Zionist invasion of Lebanon not only in Lebanon but also in the imperialist countries supporting the invasion, including France.

He became eligible for release in 1999 and the Lebanese government officially asked for his release and deportation to Lebanon, yet he is still being held in prison by French imperialism.

**Available free on Youtube:**



**@collectifvacarmesfilms4009**



# Tracking Marx's *Capital*

Michael Roberts

*In the Tracks of Marx's Capital: Debates in Marxian Political Economy and Lessons for 21<sup>st</sup> Century Capitalism* is an important new book by two well-known Marxist economists from Turkey. Ahmet Tonak and Sungur Savran bring together a series of works written by them over the last 40 years that **track** the development and relevance of Marx's analysis of the capitalist mode of production to the present day. Sungur Savran teaches at Istanbul Okan University and E. Ahmet Tonak is a research affiliate at Smith College and teaches at UMass Amherst

The book is divided into four parts to explore the core ideas of Marxian political economy relevant for modern day economies. The first part gives an overview of *Capital* and its methodology. The second part discusses the application of these ideas to the question of measuring what is **profit on alienation**, the rate of exploitation, the reconstruction of input-output tables and the role of the welfare state and social wage. The third part discusses new research in Marxian analysis in the 21st century, facing the challenges brought about by digital labour and the global economic crisis. In the final part, Sungur Savran discusses the differences between Marxist value theory and Sraffian, neo-Ricardian economics. Overall, the aim of the book is to develop an "adequate analysis of capitalism, with a view to counter and finally overcome the exploitation, oppression and alienation that this mode of production offers humanity."

In part one, Tonak takes the reader on a trip through Marx's first notes on his analysis of capitalism as expressed in what is now called the Grundrisse, written

during the year after a major economic crisis in 1857. Tonak discusses the historical context and the content of the text in detail and summarises Marx's main arguments on alienation, value and post-capitalism.

Savran takes up the story with two chapters dealing with the key points in all three volumes of Marx's masterpiece, *Capital*. Savran emphasises the radical difference between Marx's understanding of capitalism compared to the *classical* economists like Adam Smith and David Ricardo. Savran makes the very important point, often ignored by other Marxist economists, that *Capital* was seen by Marx as *critique of political economy* as it was in the 1850s, not just a development of the classical school, as many eminent contemporary Marxist economists, like Anwar Shaikh, appear to argue.

As Savran says *Capital* "should be understood as a wholesale criticism of that school." While the classical economists recognised that value in an economy was created by human labour power, they denied the contradictory character of capitalist accumulation ie the exploitation of labour by capital and so the causes of regular and recurring crises in capitalist production and investment. As Engels said, one of the great discoveries of Marx was surplus value, how the owners of the means of production appropriate a surplus from the producers of value, the labour force, seemingly through equal exchange: wages for labour. This is ignored by the classical economists. What is more, Savran insists that, while the classical economists assumed that capitalism as a mode of production is here to stay forever and never questioned the categories of capitalism such as value, money, wage-labour, profit etc., Marx dwelt at length on these categories themselves and laid bare the historically specific and transitory relations of production that they embodied.

In the next chapter both authors combine to present the very important distinction in capitalist production between productive and unproductive labour, by looking at the different branches of activity in the modern economy. Marx says that new value is only created by human labour power – but not all labour. Productive labour for capital consists of those sections of labour that create new value for the owners of the means of production. Unproductive labour is due to those sections of labour that meet often very important economic needs but do so in exchange for wages paid out of the surplus value created by the productive sectors. "Major sections of the working class in capitalist society are unproductive workers", but "this does not imply in any sense that they are less important either for the well-being of society or the class struggle." State employees, teachers, social workers, health workers are unproductive for capitalism as they do not deliver new value and surplus value for capital – indeed their wages are a deduction from overall surplus value. That partly explains why capital is so opposed to state spending and investment and in favour of privatisation. And from the point of view of Marxist analysis, it clarifies the need to look at the profitability of productive labour as the key indicator of the *health* of capitalism.

Tonak was joint author with Anwar Shaikh of the seminal work, *Measuring the wealth of nations: the political economy of national accounts*, which measures the production of nations using Marxist categories of productive and unproductive labour. And in another chapter Tonak and Yiğit Karahanoğulları clarify the

distinction between productive and unproductive labor. It first defines the meaning of exploitation based on the Marxian labour theory of value, on which the sole criterion of being exploited becomes the appropriation of surplus labour - even of those unproductive laborers, and then empirically estimates rates of exploitation of those unproductive workers in Turkey's government, finance, and trade sectors. In another chapter, Tonak joins with Alper Duman to apply the Marxist classifications of productive and unproductive labour to economies using input-output tables. This reveals the dynamics of capitalist production, unlike mainstream classification left simply at *manufacturing* and *services*.

In part 2, Tonak and Alper Duman discuss the vexed (in my opinion) question of the category, profit on alienation. Profit on alienation (POA) is presented as an extra source of profit in capitalist economies in addition to the profit appropriated in capitalist production. This rubs against my view of Marx's value theory of equalities of value; namely that total value equals total prices of production in the aggregate after the redistribution of value between capitals; and so total surplus value will also equal total profit, interest and rent. These equalities support the view that only labour creates value, and it is the distribution and circulation of that value that leads to unequal shares of total value.

The idea that there is another source of profit does not work for me. Profit on alienation is an idea that comes from an early classical economist, James Steuart. Some Marxist economists like Anwar Shaikh, and it seems Tonak and Duman follow him, interpret Marx to have accepted Steuart's concept of profit from alienation as another source of profit that does not come from the exploitation of labour in production but from the circulation of capital.

But I don't think Marx says this about Steuart's concept – on the contrary. When you read what Marx says about Steuart's classification, Marx says;

Before the Physiocrats, surplus-value - that is, profit in the form of profit - was explained purely from exchange, the sale of the commodity above its value. Sir James Steuart on the whole did not get beyond this *restricted view*; (but) he must rather be regarded as the man who reproduced it in scientific form. I say *in scientific form*, for Steuart does not share the illusion that the surplus-value which accrues to the individual capitalist from selling the commodity above its value is a creation of new wealth.

And Marx goes on:

This profit upon alienation therefore arises from the price of the goods being greater than their real value, or from the goods being sold above their value. Gain on the one side therefore always involves loss on the other. *No addition to the general stock is created.* (But) his theory of 'vibration of the balance of wealth between parties', however little it touches the nature and origin of surplus-value itself, *remains important in considering the distribution of surplus-value among different classes and among different categories such as profit, interest and rent* (my emphasis).

So, there is no new profit from trade or transfer. This *relative* profit is just that,

relative.

Why does Shaikh, however, want to make much of this? Unfortunately, Shaikh accepts that Marx's equivalences (total value = total price; surplus value = profit) do not hold, which is the neo-Ricardian critique. So, he seeks to restore the equalities by finding new value from outside the exploitation of labour in production. Also, this supposedly helps explain how in the 20<sup>th</sup> century, finance capital can gain extra profit from outside production. This extra profit comes from *revenue* (i.e., profit circulating or hoarded and now outside production). Just as a burglar can gain profit from stealing and selling on, so can a banker from extorting extra interest and fees from workers' savings and mortgages.

Now finance capital can gain profit from slicing off a bit of workers' wages in bank interest or from squeezing the profit of enterprise (non-financial capital), which is perhaps what Tonak and Duman mean. But this is not an *extra* source of profit but merely a redistribution of surplus value or a reduction of the value of labour power. It does not mean that finance capital *creates* a new source of value in the circulation of capital.

In my view, it is wrong that an extra source of profit must be added into economic accounts within Marxist theory or for that matter even with the *classical tradition* as suggested by Stueart. This concedes to the ambiguities of the modern *financialisation* theories, namely that it is finance alone that is now the exploiter, not capital as such.

That does not mean we should not estimate the amount of profit being gained from workers' wages through mortgage interest and house prices by the financial sector – and Tonak and Duman provide just that with their empirical examples in the chapter. But this financial profit is just a part of total surplus value appropriated by producer capitalists and redistributed to finance capitalists through interest and rent and/or from workers' wages (variable capital). The examples show financial profits (much of it *fictitious* in the Marxist sense). Moreover, it is not necessary to find another source of profit to balance the Marxian equations because the neo-Ricardian critique has been refuted by successive Marxist analysts: Marx's equivalences are consistent within his model.

In part 3, Tonak looks at the new forms of exploitation of labour in the digital economy. He argues that the digital economy can, as opposed to the opinion of many, be analysed on the basis of Marx's theory of surplus value and profit. Facebook produces commodities just like other companies. Moreover, the surplus value produced by the productive workers of Facebook is the main source of the profits of the company and the wages of its unproductive workers, not some extraction of *rent*.

In another chapter, Savran demolishes theories that claimed after the 1980s that the world capitalist economy had entered a new stage that could be characterised as *post-Fordist*, implying that somehow *flexibility* was equally good for the worker as it was for the capitalist. On the contrary, he demonstrates that the present digital methods of labour process control are but even more brutal forms of the subordination of labour to capital.

In another chapter, Tonak makes a very important point about modern imperialism.

New theories of imperialism mostly focus on its political manifestations (such as wars and military invasions) or on the economic consequences of capitalistically imperialistic relations (such as inequality and poverty). But the real focus should be on the role played by uneven economic relations between North and South in constituting the basis of political domination. The profit motive is fundamental to imperialism and the mechanisms of value transfer must be viewed as the means of reproducing unevenness among capitalist economies sustained by the global processes of capital accumulation. This is a view that Guglielmo Carchedi and I also expressed in our work.

In an excellent chapter, worth reading the book for this alone, Tonak and Savran summarise their views on the causes of crises in capitalism. Like me, they characterise the world economy in the aftermath of the so-called **global financial crisis** of 2008-2009 as in a long depression *in the lineage of the 1873-1896 Long Depression and the Great Depression of the 1930s*. Depressions are an expression of the historic decline of capitalism. Tonak and Savran survey all the modern theories of crisis and trenchantly demolish them to show the superiority of Marxist theory based on the law of the tendency of the rate of profit to fall for understanding the post-2008 crisis – and some of the empirical data they use to support this view come from my own work.

Finally in part four, Savran takes up the Marxist cudgels in the debate with the neo-Ricardians, who deny Marx's theory of value and from that his theory of crises. This controversy raged among left-wing economists throughout the decades of the 1970s and 1980s. Savran concludes that there is no need to abandon the Marxist theory of the capitalist economy. He rebuts the neo-Ricardians' claim that Marx's theory of value is inconsistent in that it led to **negative values**. As negative values are pure nonsense, this was the basis for the neo-Ricardian proposition that Marx's theory should be consigned to history. Negative values for a value creation theory would indeed be inconsistent nonsense, but Savran shows this neo-Ricardian claim is a fiction. Behind the neo-Ricardian critique lies the theory of value or production presented by Piero Sraffa. Savran argues that it is Sraffa's theory that is internally inconsistent, not Marx's.

Tonak and Savran show convincingly that Marx's *Capital* remains the bedrock for understanding the laws of motion of capitalist production despite fashionable attempts to revise and refute *Capital's* analysis. It still provides the only searchlight for guiding us towards a new social formation for humanity that is not based on exploitation of the many by the few but brings human beings and nature together in a world of cooperation and freedom.

# Friends of Palestine

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**It seeks to unmask the fake support of the despotism regime in Turkey of the Palestinian cause and to expose its complicity with Zionists by not heeding the boycott, divestment, and sanctions call of the Palestinians, and by maintaining economic, military, and diplomatic relations with Israel.**

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# In the footsteps of Marx's Capital with Savran and Tonak

Sergio Crescenzi<sup>1</sup>

## Introduction

I strongly wanted to review the book *In the Tracks of Marx's Capital* by Sungur Savran and Ahmet Tonak, two important Turkish Marxist economists, for several reasons. First of all, because in Italy we are inundated with books on Marxist philosophy, and for this reason we too often tend to forget that Marx was both a philosopher and a scientist. Indeed, perhaps we speak of a philosopher *precisely because* he was a scientist, because the study of philosophy provides him with a method (the dialectical-Hegelian one) capable of absorbing the discoveries of classical political economy and at the same time overcoming its limits and criticizing its mystifications. Without the science of political economy, the philosophical method spins like an idle wheel.

However, Savran and Tonak's book is not just a book on Marxist economics. It is both a very useful book for orienting oneself within Marxian economic theory, and a book theoretically at the forefront of Marxist debate. In short, it manages to be both introductory and innovative at the same time. It is a collection of essays, some

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<sup>1</sup> Member of the Italian Collective Le Gauche.

unpublished and others published only in Turkish or English. However, these are not essays put together at random. In my opinion, in fact, the common thread that holds the book together is the fundamental Marxian distinction between productive and unproductive labor.

The book is divided into 4 thematic parts: the reconstruction of Marx's general theory; the operationalization of the concepts of the critique of political economy; the burning issues of the 21st century; and the critique of neo-Ricardianism.<sup>2</sup> For reasons of brevity, in the review I will not deal with the part relating to the critique of neo-Ricardianism. I will limit myself to saying that, although I would have preferred that the authors had also clashed with other theories (for example the neoclassical or the post-Keynesian one), I found the essay against Sraffa excellent (which I invite you to read) and I very much agree with the idea of showing that Marxist economics does not need external contributions to its conceptualization, since it can very well stand on its own two feet.

## **Marx's General Theory**

### ***Marx's Systematic Project***

Savran and Tonak do not limit themselves to reconstructing the theory of *Capital*, but take into consideration the entire project of critique of political economy (from the *Grundrisse* onwards). A great merit of this part lies both in understanding the fundamentally incomplete nature of Marx's project, and his "modelistic" and scientific intentions, not reducible to a philosophy of history or a mere description cleaned up through induction. In this I found many analogies with the most advanced points of the study of Marx's work, in particular with Roberto Fineschi.

The *Grundrisse* in particular is seen as what it actually is, that is, a "conceptual laboratory," a text not intended to be published in which Marx takes notes, criticizes other thinkers, gets angry about issues, and tries to systematize his theory. As such, the text is both a fundamental stage in Marx's thought and a text that cannot be used as leverage against later texts and therefore should be taken with a pinch of salt.

This is not a mere philological point: since Marx is first and foremost a scientist, the expository order and the connection between his concepts have a meaning, they are the fruit of theoretical work, they concern his scientific method (the method of abstraction). Either these are respected, or a well-founded criticism is articulated with which this method is rejected as not working and a new one is found. Surely one cannot muddle the issue with a denunciation of philologism or hurling some pseudo-radical slogan.<sup>3</sup>

The importance of this theme is particularly evident in the discussion of the chapter on money, initially chosen as a starting point to expose his system. Tonak, the author of the *Grundrisse* chapter, shows, on the one hand, how Marx does not make

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2 Not all the chapters are the product of the two authors. Some were written by only one, others with other collaborators. I will have occasion to refer to some of these cases below.

3 Such as this one: "I do not need to dive into Hegelianism in order to discover the dual aspect of the commodity and value; money has only one aspect, that of the boss." Toni Negri, *Marx Beyond Marx*.

this decision at random (to deal with the concept of capital it is necessary to first analyze that of money), and, on the other hand how Marx understands that the real starting point from which to build the system is not money but the commodity towards the end of the manuscript.

Even in their study of *Capital*, the two authors understand that this is an unfinished work, and that Book I itself has had a troubled history. Despite this, *Capital* is certainly a more structured work than the *Grundrisse*, and at least one volume has been published. It is intended as a scientific and political book at the same time: understanding the capitalist mode of production helps us understand how to overcome it. It is neither a historical-sociological description of nineteenth-century English capitalism, nor a mechanistic philosophy of history, and the authors recognize its complex and rigorous architecture, which they even compare to a mathematical treatise.

For Savran and Tonak, the distinction between the mode of research and the mode of exposition is crucial to understanding the Marxian method and the structure of its system. The mode of research is scientific research, which is composed of both theoretical and empirical studies, cleaning up of concepts, and understanding how to order them to expose the system without skipping steps. This is followed by the mode of exposition, which they equate with the “method of abstraction,” that is, the study of the relations of the system in its totality, isolated from everything that is arbitrary and secondary, proceeding by levels that give more and more concreteness to the system.

The study of the Marxian method allows Savran and Tonak to understand that *Capital* is the child of both classical economists and Hegel, or rather, they understand that in his project Marx uses Hegel against classical economists and classical economists against Hegel. The method that Marx develops from Hegel, namely the dialectical method, serves to bring to light the real contradictions of the capitalist mode of production. The most famous examples are the contradiction between use value and value in the commodity (the cell from which the entire system develops), the dual character of commodity-producing labor (concrete labor and abstract labor), and the contradiction between appearance and essence of the capitalist mode of production (the appearance is a harmonious society in which free and equal producers exchange goods; the essence is a hierarchical society founded on the production of surplus value by the working class and its appropriation by the propertied classes).

Following this methodological path, Savran, in one of the chapters, conceives *Capital* as structured on four major levels of abstraction:

- production in general, the most abstract part that concerns every mode of production but which, on its own, does not explain the specific functioning of any of these (it is present in chap. 5 of Volume I)

- exchange in general, which consists of the analysis of the commodity and money and the concepts related to them (in particular that of value) (the first 4 chapters of Volume I)

- capital in general, the study of the pure relationship between capital and wage labor. Here, abstraction is made, in particular, from the competition between many

capitals (therefore from their difference in organic composition) and from the difference between the various types of capital (commercial, financial, rentier) to concentrate specifically on industrial capital, that is, the capital that produces surplus value (the rest of Volume I and all of Volume II)

many capitals, in which the various terms of abstraction are eliminated: the competition between many capitals and the differences between the various types of capital are studied, and hence the overall process of capitalist production (volume III).

It is important to understand that one level does not eliminate the other, but makes it more concrete. To give an example, moving from the level of capital in general to that of many capitals, due to competition and differences in organic composition, prices and values are no longer equal but must diverge, and industrial profit is no longer the totality of surplus value but only a part of it (the remainder is distributed among the many capitals in the forms of commercial profit, interest, rent). The movement from the abstract to the concrete is essentially an *aufhebung*, a supersession, of the limits of the previous level but a preservation of its scientific results. Conceiving *Capital* in this way allows us to save its theoretical content from the criticisms of those who interpret every phase of the transformation of capitalism as a radical break that falsifies its model.

It may be interesting at this point to compare this classification of levels of abstraction with that of Fineschi. The structure of his research is articulated in the way in which all the categories of Marxian theory develop starting from the internal contradiction of the commodity:

The level of simple circulation, which is the conceptual beginning, the immediate one of the capitalist mode of production, the first level of the totality, is a level of appearances, that is, it is not self-founding and therefore lacking, which therefore passes into its opposite;

The level of the generality of capital, where the categories that essentially define it are developed, is a limited model because it has the character of an ideal average;

The level of the particularity of capital, of competition, where generality is achieved through the interaction of particular capitals (different from each other) until it actually asserts itself as average profit;

The level of the singularity of capital, credit and fictitious capital, where the generality of capital actually exists as embodied in certain particular subjects.

Two differences are obvious. The first is the absence of production in general in the characterization of the model. Fineschi obviously does not ignore this aspect: he knows well that the capitalist mode of production is a specific moment in the history of labor, a history which however is the highest level of abstraction of the overall articulation of Marx's theory of history, and as such can only be the pure result of the abstraction of common elements from specific modes of production. The second difference lies in the differentiation in the field of many capitals between the level of competition and the level of fictitious capital. This differentiation seems justified to me between the two different circuits of capital, respectively that of M-C-M and that of M-M.

### ***Critique of Political Economy and Communism of Capital***

According to Savran, in one of the chapters, the concept of critique of political economy is fundamental to understanding Marx's specificity in thinking about capitalism compared to other economists. In considering the history of economic theory, Marx distinguishes between classical political economy and vulgar economics. The former (whose most important representatives are Smith and Ricardo) does not limit itself to studying the superficial relations of the capitalist economy, but investigates its essential aspects without being afraid to theorize even conflictual relations between social classes. Vulgar economics, on the other hand (of which Bastiat and Carey are examples) considers capitalism as a harmonious system. One could say that vulgar economics remains at the level of exchange in general. If this distinction holds, it is not difficult to see in today's neoclassical economics a form of vulgar economics.

Marx criticizes both vulgar economics and classical political economy, but he has decidedly more respect for the latter, with which he has a relationship of *aufhebung*. Precisely because it recognizes the conflictual nature of the economy and does not stop at its appearance, classical political economy is a science. However, it is a science limited by being internal to capitalist society itself. In fact, it considers the capitalist mode of production as "natural", not in the sense that for classical economists it has always been there, but in the sense that it is the mode of production that best expresses the characteristics of human nature, while those that preceded it are artificial. This is not due to the stupidity of the authors who developed it, but to the fetishistic nature of capitalism itself (such as commodity fetishism, which makes "practically true" the fact that human relations are mediated by goods, or capital fetishism, which makes "practically true" that each element of production naturally yields an income based on its contribution).

All this prevents classical economists from historicizing capitalism, that is, from thinking of it through specific concepts and from investigating its internal limits. They take the commodity, value, etc. as given and in doing so they smooth over the material content onto the specific social form. Marx distinguishes himself from classical economists precisely in the great attention he pays to distinguishing the general level from the specific level of the capitalist mode of production.

The critique of political economy, however, is not only a critique of economic science, but also a critique of the object of this science. Not seeing the historicity of the capitalist mode of production forecloses the possibility of a true scientific analysis of it. Taking as a problem to explain what classical economists took as given is not a simple correction, it means a complete overturning of the perimeter of science. The questions of Smith and Ricardo (e.g. the relationship between the division of labor and exchange, or between profits, value formation and distribution) are subsumed under a more fundamental question: investigating the conditions of possibility of the birth of capitalism, of its re-production and of its possible end.

I think that Savran is absolutely right in this reconstruction. There is, however, a question that must be answered to close the argument, a question that unfortunately

I did not find in the text: How does Marx formulate this new epistemic field if he himself is internal to capitalist society, which as we have said influences scientific production itself with its fetishism? The answer in my opinion is found in the class struggle. It is thanks to the conflict and the alternative practices of the subaltern that we can break the spell.

Savran insists a lot on the historicity and transitoriness of the capitalist mode of production, in particular on the fact that within it are present the seeds of future society. His interpretation is based on the preface to the first edition of Volume I of *Capital*, which speaks of the “economic law of motion of modern society”, a law *in the singular*. According to his interpretation, Marx refers to that movement of capitalism which, in its development, on the one hand, shows its great potential (enormous growth in labor productivity; socialization of labor, i.e. the impossibility of producing an object on one’s own; economic integration of the world; large-scale planning), while on the other hand, displays all its internal limits (private appropriation of the products of social labor, economic and ecological crises, wars, etc.) which frustrate these same potentials. *Capital* is therefore also a book about communism, i.e. the era in which individual interests can be better satisfied through methods of collective decision-making than through competition and struggle against other human beings. Savran obviously points out that this is a trend and that the transition should not be understood in a mechanical sense.

## **Productive and Unproductive Labor**

### ***The importance of the category***

As mentioned above, the distinction between productive and unproductive labor is what holds Savran and Tonak’s book together. We find it in practically every essay in it, so it is of capital importance to understanding their theories (as it is to understanding Marxian theory).

In general, the capitalist economy is based on the extraction of surplus value, therefore on the self-expansion of value and not on its mere conservation. Marx calls this self-expansion the “process of valorization”. For this to be possible, it is necessary for money-capital to be exchanged for a commodity capable of producing commodity-capital (commodities laden with surplus value) to then be placed on the market while waiting for their realization. The commodity in question is labor power, and the labor resulting from its consumption is, for the capitalist mode of production, “productive labor”. In this mode of production, however, there is not only productive labor, but also “unproductive labor”: this is labor that is not only not part of the valorization process, but that in the overall circuit is paid for by the surplus value created by productive workers.

On a more concrete level, this means that the division of total social labor between productive and unproductive labor plays a very important role in determining the magnitude of fundamental variables of the capitalist system. Variable capital (V), for example, contains that element of capital that produces more value than it contains, so its magnitude at the social level is determined not by the total wage

bill, but only by that of productive workers. Surplus value (S), in turn, is not only composed of the different sources of income of the various capitalist classes (rent, industrial profit, interest, commercial profit), but also includes the wages of unproductive workers. Consequently, the rate of surplus value (S/V) cannot be calculated directly by resorting to national accounting categories such as profits and wages.

The distinction also has important effects on the rate of profit, since the rate of surplus value is among the major determinants of the latter. In fact, if surplus value is produced only by productive workers, an increase in the proportion of unproductive labor to productive labor implies a reduction in the mass of surplus value and, consequently, a fall in the rate of profit. It follows that the distinction is also useful for understanding economic crises.

The distinction is also relevant in the analysis of state intervention for redistributive purposes, because a correct evaluation of the net impact of this intervention can only be based on the precise identification of its sources of revenue. On the one hand, it is a question of understanding, respectively, how the revenue shares are divided between variable capital and surplus value; on the other hand, it is a question of understanding in favor of whom these revenues are spent. Finally, it is also important with regard to the status of services (financial, social, to consumers and producers).<sup>4</sup>

### ***Productive labor in general***

Savran and Tonak believe it is important to first distinguish productive labor in general from other human activities, because productive labor in the capitalist sense is a sub-class of productive labor in general and can thus be understood better by highlighting the differences between the two. There are certain activities that are necessary in every mode of production to ensure the biological and social reproduction of the members of society. The definition of productive labor in general presupposes the identification of these activities from among others. These are: production, circulation, distribution of the product (of income), personal or social consumption and reproduction of the social order.

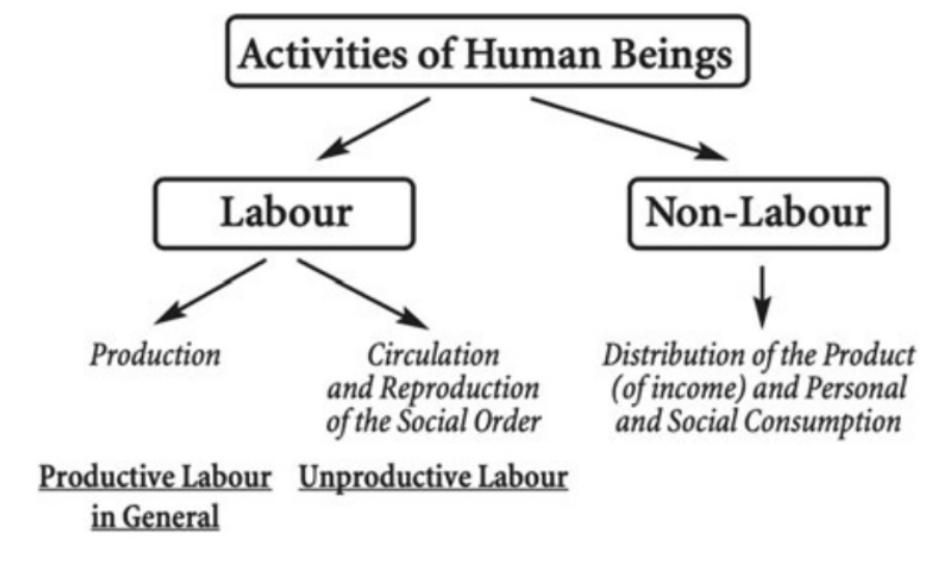
First of all, to divide them, one can use as a criterion the use of laboring activity for their realization: consumption and distribution do not need the expenditure of labor. That consumption does not require the use of labor seems self-evident to me. Distribution, on the other hand, is based on the provision of labor but does not in itself require it, proof of which is that the property-owning classes in general, who live on income derived from private property, take part in distribution.<sup>5</sup>

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<sup>4</sup> With his usual knack for adopting erroneous theoretical positions and justifying them with slogans, Negri contends that the distinction between productive labor and unproductive labor is totally useless as now we are all exploited and exploited “even in our dreams” (Antonio Negri, *A Revolt That Never Ends*, 2003). This position is entirely consistent with abandoning the labor theory of value in favor of the hoax of biopolitics.

<sup>5</sup> While, as Marx himself asserts, if the capitalist acts as the manager of his enterprise, in that case he is acting as a productive laborer and his income will be considered in the same manner as that of the managing staff: Marx even goes on to say that in such a case the capitalist will be considered a productive laborer. *Il Capitale*, p. 910, the Einaudi edition, Torino, 2024.

Circulation and reproduction of the social order are more difficult to frame. Circulation is the transformation of the commodity form into the money form and vice versa, an activity that has crossed several modes of production but which has known its greatest expansion and centrality precisely in capitalism. The reproduction of the social order has also crossed several modes of production, but as a separate sphere it was born with class societies (we are talking about the administrative, police-military and public finance apparatuses).



It is undeniable that these activities are carried out through labor, but it is a different labor compared to productive labor (industrial and agricultural). Productive labor produces use values (whether it is personal use or productive use in turn) through the appropriation and transformation of nature, all within a defined form of society. Production is in short mediation between nature and society, organic exchange between nature and human beings. Circulation and the reproduction of the social order, on the other hand, do not transform use values, but serve respectively to pass them from hand to hand and to defend their possession. As such, these are activities that are fully internal to society, specifically concerning social relations between human beings. For this reason, labor within the sphere of circulation and the sphere of reproduction of the social order is unproductive by definition.

***Productive labor for capital***

In the capitalist mode of production, productive labor acquires a more specific character. As we have said, the capitalist mode of production is based on the process of valorization. Therefore, for labor to be productive, it is not enough that it transforms and appropriates part of nature in a social framework, but it is necessary

that it produces surplus value. Productive labor in the capitalist sense is that labor that produces commodities that contain surplus value, that is, labor provided by labor power made to work more than the time necessary for its reproduction, whose product is placed on the market waiting to make a profit. To understand this point, it is useful to introduce the concept of the “circuit of capital”:

M-C (LP, MP) ...P...C'-M'

The chain above means that the capitalist spends money-capital (M) to buy commodities (C, where LP stands for labor power and MP for means of production) to combine in the production process (P), so as to produce goods containing surplus value (C') to sell in order to realize a profit (M', which must be > M). All the labor exchanged for money-capital and employed in the sphere of production is productive labor for capital. From this several consequences arise:

- the labor spent to produce use values that will be consumed without passing through the market is not productive labor for capital. Since these use values do not pass through a market relationship, one cannot in fact speak of commodities.
- the labor of small independent producers is not productive work for capital, since it is based on work provided by the owners of the means of production themselves (and who therefore do not buy labor power on the market from which to extract surplus labor)
- the mere sale of labor power for money to a capitalist is not sufficient to speak of productive labor for capital. It is one thing to exchange labor power for income, another to exchange it for money-capital. To understand this point, let's say that at the end of the circuit another circuit opens in which not all the realized surplus value is reconverted into money-capital. This money therefore leaves the capital circuit to enter the income circuit, and for capitalists its function is consumption. This income can be consumed essentially in two ways: consumer goods and/or labor power, e.g. a cook. The labor that the cook in this case expends for the capitalist is completely different from that which he would expend in a restaurant business. The labor power bought in this case in fact produces a use value that is consumed directly by the capitalist, without being placed on the market (it does not become C', and nor M'). It is therefore a commodity, but this is not laden with surplus value, therefore the labor performed is not productive in the capitalist sense.
- The activities “around” the circuit, however necessary they may be, are not productive. For example, for the circuit to start, it may be necessary to provide the productive capitalist with a certain amount of money-capital M, which will yield an interest to be deducted from his profit. The supplier of M is a capitalist enterprise in its turn (a bank), employing wage workers. Although their labor is necessary for production, necessity is not synonymous with productivity.

Circulation and transport should not be confused (for example, a house on the market circulates but is not transported). Transport and storage are necessary el-

ements of the production process itself in every mode of production and should therefore be considered productive work both in general and for the capitalist mode of production (provided that the activity takes place in the form of the circuit of capital). This is because the use value of products materializes only in their consumption.

However, if we are talking about transport and storage due to specific reasons of circulation (e.g. speculation or re-exportation for triangulation purposes) this is unproductive labor.

Circulation concerns those jobs that serve to pass from the commodity form to the money form (e.g. the cashier).

The profit earned by commercial and banking capital (commercial profit and interest) is a portion of the total surplus value produced in production, and the wages paid to workers in these two sectors are paid out of this surplus value.



***Work in the services and public sector***

The concept of “services” includes a large number of different types of work, of which it cannot be said a priori whether or not they are productive work. In gen-

eral, according to Savran and Tonak, what defines services is the simultaneity of production and consumption, that is, their being consumed at the same time as they are produced. This fact, their “immateriality” (and it is not even said that these are immaterial: think of a made bed, a cleaned coat, etc.), does not influence whether or not they are productive, either in general (because some of them transform nature) or in a capitalist sense. What the consumer buys and consumes is the worker’s labor itself, together with the time used for the inputs. Capitalistically organized services, however, imply that the worker sells his labor power to a capitalist, production and consumption are simultaneous and the greater money that comes from this closes the circuit. All this implies that a growth in services does not necessarily mean a growth in unproductive labor; one must know how to distinguish between the cases.

Public activities under capitalism are also very diverse. Savran and Tonak divide them into three large groups:

- the reproduction of the social order (the administrative bureaucracy of the various levels of the public sector, the police and the army, the courts of justice, the prison system, etc.). This is unproductive work by definition;
- the organization of productive activities through partially or totally publicly owned enterprises. For the two authors, whatever difference there may be between private and public production (tampering with output prices, excessive labor employment, chronic losses, etc.), from the point of view of the production of surplus value there is no difference: these enterprises hire workers to produce goods full of surplus value to sell on the market and appropriate the surplus value. This is therefore productive labor;
- the provision of social services (education, health, housing policy, etc.), i.e. the Welfare State. This is the most difficult case to decipher because of the variety of jobs that fall within it. On the one hand, these do not sell services as commodities containing surplus value, so they cannot be seen as capitalist enterprises; on the other hand, workers such as doctors and nurses, teachers etc. produce services (use values) different from workers who reproduce the social order. Therefore, their labor is unproductive at a capitalist level, but not at a general level, and if it were organized in a capitalist manner (e.g. private schools or private health care) it would be productive. This tells us a lot about the trends of current capitalist societies: the assault on the Welfare State implies both the privatization of public services and the approaching of, say, tuition fees and all other charges made to the provision of public services to the market price that these would have if they were organized in a capitalist way.



### ***Unproductive labor and exploitation***

From what has been said it seems logical to deduce that exploitation is linked to the concept of surplus value, therefore that workers who do not produce it, i.e. unproductive workers, are not exploited. Tonak and one of his co-authors Yiğit Karahanoğulları in one of the chapters of the book, however, do not agree with this line. It is true that Marx in Volume I of *Capital* equates the rate of surplus value with the degree of exploitation of labor power. It must be said, however, 1) that in the volume under consideration the assumption is that all workers are productive and 2) that in other passages of *Capital* he expresses the rate of exploitation by dividing surplus labor and socially necessary labor time. Even unproductive workers exchange their labor power for capital and can work more than the time necessary for their reproduction.

To measure the rate of exploitation of unproductive workers the authors propose the following formula by Shaikh and Tonak (*Measuring the Wealth of Nations*, 1994):

$e_{up} = \{[(h_{up}/h_p)/(ec_{up}/ec_p)]*[1 + (S/V)]\} - 1$ , where:

$a_{up}$  = rate of exploitation of unproductive workers

$h_{up}$  = working time of unproductive workers

$h_p$  = working time of productive workers

$ec_{up}$  = total wage bill of unproductive workers

$ec_p$  = total wage bill of productive workers

$(S/V)$  = rate of exploitation of productive workers, i.e. rate of surplus value

From the formula it is clear that to calculate the rate of exploitation of unproductive workers it is necessary to first calculate that of productive workers. This respects the implication of the theory, according to which unproductive workers are paid a portion of the surplus value produced by productive workers.

### ***Operationalization of Marxian Concepts***

In the second part of their book, four articles by Tonak and some of his co-authors operationalize Marx's concepts, that is, they try to find good proxies at an empirical level to test their analytical capacity. I will not summarize their findings here (their field of research is mainly Turkey), but I will limit myself to showing some relevant concepts they have exposed that allow a good operationalization to those who want to try their hand at the difficult task of data analysis.<sup>6</sup>

### ***The two sources of profit***

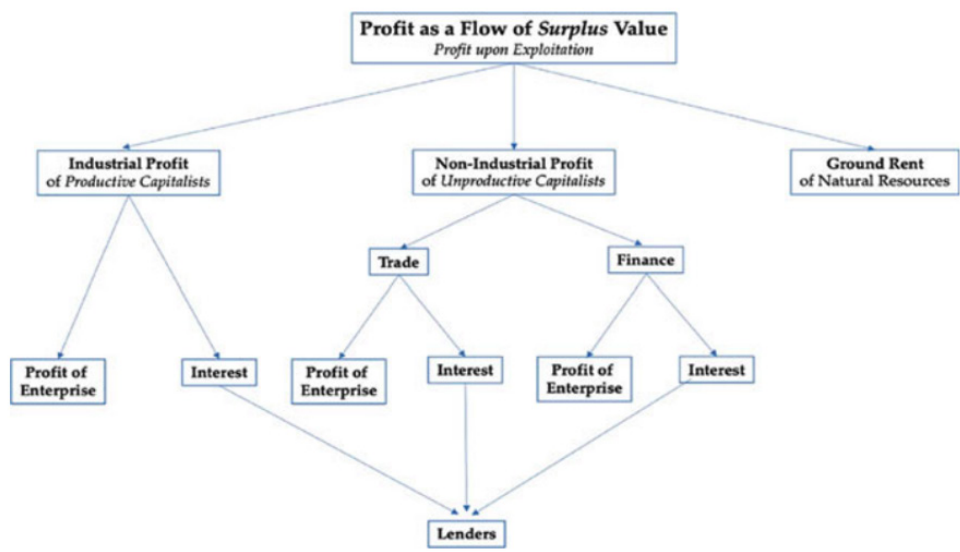
Tonak and one of his co-authors, Alper Duman, referring to Marx's *Theories of Surplus Value*, show that in his theory there are two sources of profit:

1. profit by transfer or on alienation, whose source lies in circulation. Its functioning can be summarized in the motto "buy cheap and sell dearer". In practice, a zero-sum game is created between the exchangers, because the profit of one is the loss of the other, without the total value being increased in the process. This is a form of profit present above all in the pre-capitalist era, but which has not ceased to exist in capitalism (e.g. in trade, revenue and finance)
2. profit through the production of surplus value (or industrial profit), the locus of which is production. This is the type of profit typical of the capitalist mode of production. The prerequisite for this type of profit is that labor power is exchanged for money on the market, and that this can be consumed for a time span that generates more value than is necessary to reproduce it. The difference between the total working day and the part necessary for the reproduction of labor power is the surplus labor, to which the surplus product and the

<sup>6</sup> In the book, there is also an interesting analysis of input-output networks converted through Marxist conceptual lenses. I have omitted to take up that discussion out of concern for the length of the article.

surplus value correspond. In this case we can speak of a positive-sum game, because more value is produced than was involved before the production process.

Industrial profit, however, is generally only a fraction of the total surplus value produced. This is because the basis of the profits of unproductive sectors (such as trade and finance) are the productive ones, so the surplus value produced by the productive sectors is distributed to the unproductive ones through various mechanisms (e.g. interest, rent, royalties).



From the figure it is clear that neither productive nor unproductive capitalist enterprises pocket the totality of their profits, because they have to pay interest to creditors. Therefore, at the level of empirical measurement, it is necessary to keep in mind the conceptual differences: if one wants to estimate the totality of the surplus value produced by an economy, all its monetary expressions must also be considered; if one wants to measure profit, on the other hand, one must focus on the net profit of all capitalist enterprises.

Given its nature, profit on alienation can also arise from transfers between different circuits. Duman and Tonak focus in particular on the transfer from the state and household circuit to that of capital, in the respective cases of the land sector and the financial sector.

In the first case, the State gets rid of its plots of land through privatization policies at a price lower than the market price. This means a net gain in the capital circuit and a net loss in public wealth (state circuit), without there being an overall increase or decrease in total wealth. The capitalist then has three options: 1) sell the land at the market price, i.e. a further profit on alienation; 2) wait and sell the land at a higher market price than the current one (profit on alienation to which is added an additional profit due to differential rent); 3) use the land in a capitalist way (e.g. building a house on it), in whose total profit (market price – costs in constant and variable capital) both the profit on alienation and the profit by production of surplus value are included.

In the second case, that of the financial sector, workers who request loans repay them by transferring a part of their income from the income circuit (families) to the capital circuit (the bank), and in total the repayment is greater than the loan obtained.

## **The net social wage**

The social wage is the expenditure that the public sector directs, both in monetary terms and in kind, towards its working population. Yakup Karabacak, another co-author for one of the chapters and Tonak go over the debate on this issue and show that it has reached the following conclusions:

- the social wage adds to the struggle between capital and labor and between state and labor
- a high social wage reduces profits (and the rate of profit) thereby mitigating income inequality between classes
- the social wage slows down the accumulation of capital (generates crises) and reduces the maneuvers of capital

For these reasons, the social wage debate has come to the conclusion that public sector spending is pro-labor and anti-capital overall. Karabacak and Tonak agree only on the first statement, but in their empirical research (which shows how the Turkish net social wage has varied over time) they give us the tools to doubt the other two.

In practice, capitalist economies do not exist without state intervention, although this varies from country to country and has generally increased since the Second World War. In the economy, the most important activities of the state, after production activities by the public sector, are taxation, public spending and transfers. The monetary quantities taken into consideration among these activities are variable capital (V) and surplus value (S), while at this level of abstraction Karabacak and Tonak consider the remaining part of the gross product (the constant capital C) as the fund invested to replenish the means of production consumed in the previous period, and therefore as untaxed.

In addition to production, the capitalist economy also hosts unproductive activi-

ties (trade and finance, UP) that depend on the productive sectors. Therefore, part of the total surplus value produced by the economy is transferred to the unproductive sectors ( $S_{UP}$ ) and the rest ( $S - S_{UP}$ ) is kept within the productive ones. The same unproductive activities still function by minimizing costs ( $W_{UP}$  and  $C_{UP}$ ) and maximizing profits ( $S_{UPprofit}$ ), and the State will also tax these activities.

On the one hand, the state taxes the profits of companies, but on the other hand it provides them with subsidies. Considering profits in general net of taxes and subsidies, state activity converts the nominal total surplus value into the effective total surplus value ( $S_{eff}$ ). However, the state does not only tax the profits of companies, but also their wages and salaries, and in this case too it provides them with subsidies and transfers. In this case, state intervention converts the nominal wage ( $W$ ) into the effective wage ( $W_{eff}$ ), and the nominal variable capital ( $V$ ) into the effective variable capital ( $V_{eff}$ ).

At this point we have all the elements necessary to talk about the relationship between the rate of surplus value ( $S/V$ ) and the net social wage (Net Social Wage, NSW). Generally, the rate of surplus value is calculated by dividing the monetary form of the surplus value  $S$  by the monetary form of the variable capital ( $V$ ), that is to say ( $S/V$ ). However, this presupposes a very high level of abstraction, in which there is no state intervention with its taxes and transfers. Considering this intervention instead allows us to affirm that, in the case of a negative social wage, the effective variable capital will be lower than its nominal value, and therefore state intervention will have the effect of increasing the rate of surplus value:  $S/(V+NSW)$

Karabacak and Tonak calculate the net social wage (NSW) taking into consideration both the transfers in favor of the working class ( $B$ ) and the taxes paid by it ( $T$ ). We therefore have that  $NSW = B - T$ .<sup>7</sup> To adapt the data collected by the various institutions to this framework, intermediate steps must be taken. On the side of state revenue, the authors exclude from the calculation those revenues that they have not been able to allocate between the social classes; on the side of state expenditure, this has been reclassified into three groups:

- Group B1 is that set of expenses that contribute neither to the income nor to the consumption of the working class (e.g. police and military)
- Group B2 is that set of expenditures whose benefits flow variously to the different classes (e.g. energy, transportation, environmental protection, health, education); Karabacak and Tonak assume that the working-class benefits from these expenditures in proportion to the wage share (labor share, LS)
- Group B3 is that set of expenditures that benefit entirely the working class (e.g. social security and unemployment benefits)

Public spending on the working class is therefore  $B = (LS*B2) + B3$ .

They also divide public revenues into three groups:

- Group T1 consists of taxes paid by the working class (social security and

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<sup>7</sup> Top managers are excluded from the laboring population, as well as the self-employed for reasons of empirical difficulty.

unemployment insurance deductions)

- Group T2 consists of taxes paid by the entire population (e.g. VAT, income tax, IRPEF, various excise duties, etc.); Karabacak and Tonak assume that taxes paid by the working class in this group are proportional to the wage share (LS)
- in group T3 there are taxes paid by social classes that cannot be traced back to the working class (e.g. Corporate Income Tax, real estate tax, etc.)

We therefore conclude that the taxes paid by the working class are  $T = T1 + (LS * T2)$ . We therefore have all the parameters to calculate the net social wage (NSW) of the working class:

$$NSW = [(LS * B2) + B3] - [T1 + (LS * T2)]$$

A positive value will indicate a net contribution of the State towards workers, while a negative number means a State unfavorable to the working class.

## 21st Century Issues

In this section of the book Savran and Tonak try to frame and address, through Marxist economic theory, the various challenges presented by changes in the capitalist mode of production (digital economy, lean production, imperialism and economic crises).

### Digital platforms and productive work

The digital economy is a very diverse sector. In the Marxist debate, the question is whether surplus value is extracted in this sector and, if so, at what point in the labor process this happens. Returning to the concepts set out above, according to Tonak, the author of the chapter on digital labor, in the digital economy there are companies that exploit both productive and unproductive labor. Where should digital companies be located?

To answer, let's start from the consideration that Facebook, as a capitalist enterprise, buys means of production (e.g. computers, monitors, chairs, tables, etc.) and labor to produce a commodity that, when sold, allows it to obtain a greater amount of money than it has spent. And what is this commodity? According to Tonak, the commodity that Facebook produces is the public that interacts in its digital ecosystem. This ecosystem has a dual aspect: it is an environment for both users and advertisers.

Users are effectively small independent producers, whose product is their profile and their content. They are not exploited, since they do not sell their labor power to Facebook, and therefore produce value but not surplus value. They own their means of production and can produce goods to sell.

Advertisers are typically capitalist firms that produce advertisements to reach potential consumers. Those employed to produce these advertisements are productive wage workers who produce surplus value. An advertising firm buys access to a target audience in the form of a commodity from Facebook. The realization of the use value of this commodity occurs when the attention of users leads to the decision to

purchase the advertised commodity.<sup>8</sup>

Precisely because the audience in this ecosystem is sold to advertisers, the ecosystem is definable as a commodity, and the workers who produce this ecosystem are productive workers, who produce this commodified ecosystem containing surplus value. Surplus value is realized when this ecosystem is sold to advertisers. In fact, Facebook makes the bulk of its money from selling ads, while a portion comes from selling data provided by users.

Facebook's production process works like this:

- the workforce purchased by Facebook uses its skills (e.g. web design, digital engineering) to produce the digital ecosystem visible to consumers. Now, this ecosystem does not seem to be a commodity, since registration is free. But if we stop here, we will have overlooked a fundamental fact: to access Facebook it is necessary to produce content (including the simple profile). For Tonak, there is therefore a sort of initial barter between Facebook and the user: Facebook provides the user with an ecosystem of social interaction, the user provides Facebook with his content. In short, the user becomes a small independent producer who pays Facebook in kind. The content produced by the small independent producer is then a commodity, which in turn contributes to enriching Facebook: content creates social interaction, and this attracts advertising companies.
- Facebook owns the users' content, and uses it as an input (a sort of raw material) by "packaging" it in the form of target audiences. The various target audiences are sold to advertisers, modulated in terms of temporal exposure and audience size.

## Lean Manufacturing as the Last Phase of Taylorism

Savran has some very interesting theses regarding lean production (which in studies has taken various names: Just in Time, Japanese system, Toyotism, total quality control, post-Fordism, etc.). First of all, unlike academics who, in order to sell themselves, must invent radical ruptures in capitalism capable of falsifying Marxian theory, he believes that this new form of production management is instead easily explained by Marx's categories. This does not mean that he does not see the novelties with respect to Taylorism. To understand what happened, he begins his discussion by explaining how Taylor's system works.

### *Taylorism and Fordism*

Taylorism is the systematization of the real subsumption of labor under capital. According to Savran, this system presupposes the era of the great imperialist monopolies (due to its implementation costs), and is a set of techniques that accepts the level of technological development as given (it is therefore not the result of new

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<sup>8</sup> Tonak reiterates often that the process in question is absolutely one that is material. Without electromagnetism and the various gadgets (computers and mobiles) all this would simply not have existed. Talk about "immaterial labor" is nonsensical.

technologies). Taylor did not invent the despotism of capital (i.e. the positing of the purpose of the production process by the capitalist and not by the workers), nor the detailed (technical) division of labor (i.e. the fragmentation of complex work into simple and repetitive parts, which implies deskilling), nor the command of capital over the speed of the labor process (i.e. the worker who works under the sway of the machine, acts in thrall to its rhythms, and therefore becomes an extension of it), but he systematized techniques to extract the maximum possible surplus value from these processes.

Its purpose is to prevent the worker from controlling his own work, and therefore to adopt techniques that slow down the pace, which would lead to a drop in the intensity of work and therefore to an increase in costs. To solve this problem, Taylor thinks that it is necessary 1) to transfer the knowledge of the work from the worker to management; 2) to separate the conception and the execution of the work, so that the first is in the hands of management; 3) to plan in detail and constantly supervise each step of the work process.

Management does this by breaking work into smaller tasks, measuring how long it takes on average to do them, and then calculating how long it takes to do the work as a whole. The level of technology does not matter in implementing these principles, as long as the implementation costs are lower than the growth in surplus value resulting from increased labor intensity due to the adoption of these principles. This intensifies the expropriation of the worker regarding knowledge of the production process (and therefore produces deskilling), excludes the possibility of scientific improvements by workers, produces the division between manual and intellectual labor, and takes away bargaining power from craft unions.

Savran limits his discussion to Taylorism because he rejects the concept of Fordism. According to him, this is a hollow concept, because Fordism is nothing more than a form of Taylorism to which the moving assembly line is added. The issue of workers' consumption, which is usually used as a defining aspect of Fordism because of its high-wage policy, is not important to him, even if he does not explain why. On this specific point I agree: I believe that Ford could afford to pay higher wages because he adopted production techniques that reduced costs. However, I do not agree that Fordism is a hollow concept in general, because I believe that with Fordism important heights were reached in terms of the disciplinary power exercised over the life of the worker.<sup>9</sup>

### ***The Contradictions of Taylorism-Fordism***

Savran also shows the contradictions inherent in Taylorism-Fordism, which are:

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<sup>9</sup> "In the early twentieth century, the Ford Motor Company established a Sociological Department, dedicated to inspecting employees' homes unannounced, to ensure that they were leading orderly lives. Workers were eligible for Ford's famous \$5 daily wage only if they kept their homes clean, ate diets deemed healthy, abstained from drinking, used the bathtub appropriately, did not take in boarders, avoided spending too much on foreign relatives, and were assimilated to American cultural norms." E. Anderson, *Private Government: How Employers Rule Our Lives (and Why We Don't Talk About It)*, Princeton University Press, New Jersey, 2017, pp. 49-50.

- the large presence of idle time, the amount of time that the worker does not use to produce. These times do not necessarily depend on the laziness of the workers: in a system in which the worker is subjected to the infernal rhythms of the machine and to repetitive work to the point of nausea, it is absolutely normal to take a moment of rest. However, it is not normal for capital, for which idle time brings in no return. Furthermore, idle time creates the problem of “balancing of the line”: since the output of one workstation is the input of another workstation, idle time can cause disharmonies between the rhythms of the various workstations.
- slowing down the assembly line: in the case of a decrease in demand, slowing down the assembly line is an economic necessity, because if it did not happen, loads of unsold inventory would pile up. The problem is that in the Taylorist assembly line, slowdown causes an increase in idle time. The rational thing for capital to do would be to fire some workers and redistribute the others along the line, but this is difficult to do because of specialization.
- the impossibility of using workers’ knowledge: although Taylorism aims to expropriate the conception of the work from workers in favor of management, workers’ experience in manual labor gives them knowledge that, to the extent that it remains foreign to management, gives it a certain power and prevents the even more profitable organization of production.
- waste: in the classic assembly line all workstations have a certain reserve of supplies, to prevent disharmonies in the rhythms from creating downtime. This system is called Just in Case (JIC). Since these supplies are rarely used in practice, this means that for the capitalist a given amount of produced capital remains unproductive. Furthermore, since quality control in the classic system is carried out separately and following the production process, it is possible that production defects are discovered after a long time.

### *The Origin of Lean Manufacturing*

Lean Manufacturing is, for Savran, the attempt to resolve all these contradictions. Formalized by Taiichi Ohno, it can be defined as that type of production purged from the use of resources that are not strictly necessary for production. In my opinion, the most original part of this essay lies in the explanation of the origin of this type of management.

Lean Manufacturing was born in Japan and spread in that country in a very particular context. From the beginning of modernization (around 1860) until the Second World War, Japanese capitalism has always suffered from competition from Western capital, especially American capital. After the destruction caused by the war, Japanese companies had to find a way to make their way in international competition and recover the gap in labor productivity. The solution was precisely the adoption of Lean Manufacturing. In doing so, Japanese capital waged war against its workers to increase the rate of exploitation.

It is therefore no coincidence that the strength of Japanese capitalism began to be felt in the 1970s, and it is also no coincidence that Lean Production began to be

adopted at a general level precisely in those critical years for capitalism as a whole (stagflation, profitability crisis, etc.). From a national solution to catch up with international competition, Lean Production became part of a broader strategy of attack on workers (together with the privatization of social services, the flexibilization of the labor market and the attack on unions) aimed at arresting the profitability crisis.

This thesis is extremely interesting because it strikes at the workerist theory (i.e. the *operaista* theory emanating from Italy, particularly in the 1970s): it is not the activity of the workers that forces capital to react and innovate, but the pressures due to costs, profitability and competition from other capitals.

### ***The Lean Manufacturing Core as a Taylorist Solution***

The central concept of Lean Manufacturing is Just in Time (JIT), which is usually contrasted with JIC as a waste reduction technique. But for Savran, it is much more: it is about identifying and eliminating idle time altogether. It does this through its visualization system (andon): if the assembly line is moving quickly, a worker at his workstation who cannot keep up with the pace of the line will have to start using inputs from stock, but if there are no stocks, he will be under great pressure to get back up to speed. At each workstation there is a signaling system with three lights: green, yellow and red. If the assembly line is running normally, the green light is on; if there are partial problems, the yellow light is on; if the workstation cannot keep up with the pace of the line, the red light is on. Now, for the old system, the ideal would be to always have the green light on. But in Lean Manufacturing, management deduces from a constant green light that there is unnecessary surplus work at the workstation. So, in this case, the station is assigned more and more work, or its workers are sent to other stations, until it lands in the point where it reaches the limit of pressing the yellow button.

This means that the balancing of production occurs through continuous pressure. But the pressure exerted goes beyond the discovery of unnecessary surplus labor: it must be exerted continuously, in order to increase the intensity of work and eliminate idle time and waste. This continuous improvement (Kaizen) in Japan has had the effect of making workers arrive at work earlier than scheduled and also making them work during breaks. Not only has the intensity of work increased, but the working time also increases.

To solve the problem of slowing down the chain, Lean Manufacturing uses both interchangeable workers and a restructuring of the workstations compared to the Taylorist system. In the Taylorist system, the workstation was a line formed by a group of workers working on the same machine; in Lean Manufacturing, the workstation is U-shaped, houses several machines and the worker is moved from one machine to another in case there is a risk of downtime (modular system). In addition, maintenance functions, which were previously performed by workers other than those employed in production, are now performed by the production workers themselves. In the same manner, quality control occurs simultaneously with the production process and waste is avoided.

### ***The problem of extracting knowledge from workers***

Lean Production uses Total Quality Management. First, through “suggestion schemes” and “quality circles”, the worker communicates to managers his suggestions for improving production. Paradoxically, this not only translates into an increase in work rates, but also into a saving in variable capital. The simultaneous performance of production and quality control in fact implies that “quality” does not only concern the final consumer, but every link in the production chain. On the one hand, this means that the capitalist does not have to hire quality controllers, on the other hand it means adding further pressure on workers: poorly done quality control and absenteeism not only attract the ire of the company, but also of colleagues. In the classic system, on the other hand, pressure worked downwards.

Furthermore, total quality management makes the worker feel himself important to the company as a result of the consideration his ideas are given and the rewards. All this makes the company seem like a big family and diminishes the importance of class struggle, also through various tricks (such as the company anthem). In the classic system, once the employee finished work, he used his free time to rest and consume. But the identification of the worker with the company has made free time a time span in which the worker reflects on how to improve production, thus turning the worker’s leisure into work time.

### ***Class Struggle in Lean Manufacturing: The Fragmentation of the Workforce and of the Workplace***

Lean Manufacturing has two aspects: the relationship between capital and labor (the management of workers within the company) and the relationship between the various capitals (the fragmentation of the workplace into a set of small businesses that gather around the main company).

The lean workforce is divided into two groups: the core and the periphery. The core consists of relatively secure and better-paid workers, while the periphery consists of low-income, precarious workers. Workers in the core are generally loyal to the company and sacrifice for it in terms of discipline and working hours. The point Savran makes, however, is that this is not due to their “corporate culture,” but to economic factors that “force” workers in the core to behave this way. The downside of the Japanese system of lifetime employment in a company is that it is difficult to find a good job elsewhere if one quits. Furthermore, the poor provision of social services by countries like Japan and the US forces workers to rely on those provided by the company. Japanese unions are also organized at the workplace level, so their success depends on the company itself. It should also be considered that, since a part of the salary depends on the worker’s better performance and that these evaluations are made on the basis of subjective factors such as positive attitude, then in order to increase their standard of living, workers must demonstrate this positive attitude.

In addition to the fragmentation of the workforce, there has also been a fragmentation of the workplace. Compared to the early 1970s, when vertical integration aimed to centralize the entire chain of productive and unproductive activities under

the control of a single capital, two contradictory trends have been activated. These are, on the one hand, mergers and acquisitions that strengthen vertical integration, and on the other, the supply chain model, in which a company specializes in some “core skills” and then outsources to other supplier companies other functions that it previously performed itself. There is also the franchising system, in which brands create international chains not upstream (i.e. in the inputs) but downstream (advertising, merchandising, etc.). This type of production structure reduces labor costs because most of the companies that work in the supply chain or in franchising are small or medium-sized and this makes unionization much more difficult. The loss of economies of scale is therefore compensated by a greater appropriation of surplus value.

In essence, Lean Manufacturing increases the extraction of both absolute and relative surplus value:

- the extraction of absolute surplus value occurs by lengthening the working day or increasing the intensity of work; this occurs when the worker comes to work earlier or finishes later, or when he works during breaks, or when the worker thinks about how to improve production during his free time; it also occurs at the level of peripheral workers (supply chain and franchising), because the workers are not unionized and have few legal protections, so they are made to work more
- the extraction of relative surplus value occurs, keeping the length of the working day and the intensity of work constant, by causing the value of variable capital (the purchased labor force) to fall. The value of variable capital falls in two ways: either the real wage falls (and social reproduction allows this only if it does not fall below the subsistence level), or the productivity of labor increases (i.e. the production of the same commodity in a shorter time than before), and this, with the same real wage, decreases the value of labor force and therefore increases the share of surplus labor extracted in relation to the share of labor time socially necessary for the reproduction of the labor force; at the level of real wages, Lean Production has made common the “atypical” contractual forms that pay lower wages, and by eliminating waste it has increased labor productivity

## Imperialism

Tonak has some interesting ideas about imperialism. First, he argues that imperialism is not a phenomenon peculiar to capitalism, but has historically manifested itself in other modes of production. To understand capitalist imperialism and distinguish it from its manifestations in previous modes of production, it is necessary to focus on uneven economic development and the mechanisms of value transfer.

The way he considers the relationship between capitalist imperialism and competition is also extremely interesting. Tonak criticizes the theory of imperialism based on monopoly capital, because those who affirm this believe that the only possible concept of competition is the neoclassical one: “perfect” competition, based on a set of price-taking firms all equal to each other. For the author this concept of

competition is wrong as well as its opposite which states that competition no longer exists or that it is “imperfect”. The concentration and centralization of capital are phenomena resulting from the intensification of competition, not a manifestation of its disappearance. The theory of capitalist imperialism therefore requires a theory of real competition, which investigates the determination of the real exchange rate, the formation of prices and the effects of international trade. This implies that imperialism should not be seen as an exercise of power by monopolistic firms of developed countries over those of developing countries, but as the manifestation of uneven capitalist development.

It is from unequal capitalist development that, according to Tonak, value transfers arise, and not vice versa. The latter are at most, in a kind of vicious circle, a means to perpetuate unequal development, but are not its cause. Their mere existence cannot therefore be taken as the cause of inequality between the regions of the world.

Even on the issue of repatriation of profits through foreign direct investment, one must tread carefully: according to 2019 data, inflows to developed economies have recently been greater than those to developing economies. Furthermore, Tonak accepts Gordon’s thesis according to which capital flows to developing countries do not depend primarily on low labor costs or greater opportunities to extract surplus labor, but on other factors: proximity to large domestic markets, relative stability of prices and trade horizons (e.g. exchange rate, tax regime, macroeconomic stability, presence of skilled labor), and political-institutional stability (e.g. presence of good infrastructure). He also shows that the thesis of a labor aristocracy living on repatriated profits is highly unrealistic, using the example of the USA.

## Crisis Theories

Savran and Tonak distinguish two types of crisis: recession, i.e. a short period of economic contraction that occurs at the end of an economic cycle and that is overcome through the adjustment of market forces and minimal public intervention, and depression, i.e. a long period of economic contraction (we are talking about decades) that cannot be resolved with some adjustment or public intervention, but requires a general upheaval (1873-96, 1929-1945, 2007-today). They try to evaluate the various theories of crisis in the different schools of economic thought to understand the current one.

### *Neoclassical deniers and Keynesian realists*

According to neoclassical economics, a depression deriving from endogenous reasons is impossible. These can only exist due to external shocks: wars, revolutions, a sudden and unexpected increase in the prices of goods, extraordinary weather conditions, errors in economic policies. This is because, through the mechanism of price adjustment, supply and demand always return to the equilibrium point. Savran and Tonak do not dwell on these theories, because experience is enough to falsify them.

Keynes’s ideas are treated differently. According to Keynes, the economy can reach a variety of equilibrium states, including an equilibrium with an undesirable

level of involuntary unemployment. A crisis, in this framework, occurs when effective aggregate demand (demand at a social level supported by money) is insufficient to create full employment, and thus places society in a state of under-utilization of its productive capacity. Keynes's theory of depressions is not, however, an under-consumptionist one because for him the determining variable of effective aggregate demand (and, more generally, the driving force of the capitalist economic system) is investment, not consumption.

For Keynes, what determines the level of investment is the difference between the expected returns on capital investment (the marginal efficiency of capital) and the interest rate (capital expenditure). Since both expected returns and the interest rate vary over time, investment decisions are influenced by expectations about their level. In turn, expectations, under conditions of radical uncertainty, are driven by what Keynes calls "animal spirits," a kind of spontaneous optimism of entrepreneurs that spurs them to action. State intervention, whether through monetary or fiscal policies, is necessary to restore the normal conditions in which these animal spirits can operate.

Savran and Tonak attack Keynesian theory a bit like Marx attacked Ricardo: if the latter had taken refuge in agronomy because he was unable to account for the economic laws that determine income, Keynes takes refuge in psychology because he is unable to account for the economic laws that determine the rate of profit and the rhythms of accumulation.

### ***Marxist Theories***

Marx attacks the classical version of automatic equilibrium, namely Say's law of outlets. According to this alleged law, since all production in the capitalist division of labor revolves around the exchange between the goods that each economic agent produces, it follows that all production creates a demand for other goods of a magnitude equal to the value of those produced, and therefore total supply will necessarily equal total demand. In this framework, a crisis at the endogenous level is impossible.

Marx's criticism is based on the possibility that sellers of goods delay the purchase of other goods and therefore hoard. Marx, in short, breaks Say's presupposition according to which the act of buying and the act of selling are simultaneous: it is true that every purchase is also a sale, but it is not true that every seller is also a buyer. The way Say puts it, it almost seems as if the economy is based on barter; however, in a monetary economy the act of selling and the act of buying of a single subject are mediated by the conversion into value of the object sold and by the reconversion into another commodity of the value obtained. If a sufficiently large number of sellers decide to hoard, the fall in demand makes a crisis possible.

For Marx, the crisis is both a problem and a solution for capital, because it brings to the surface all the internal contradictions of the accumulation process. Every crisis requires a solution to two problems: 1) an increase in the rate of profit and 2) the elimination of the means of production that are subject to depreciation, that are no longer competitive and that have been surpassed in terms of productivity

(devalorization).

Marx's analysis also considers the difference between the cause of a crisis and its form of appearance (its trigger) to be very important. Examples of this can be the crisis of 1973-4 and that of 2008. In the first, the form of appearance of the crisis was the increase in the price of oil, while the real cause was the fall in the rate of profit over a very long period of time due to the replacement of living labor with machines and automation. In the second, the form of appearance was the subprime mortgage crisis, while the cause was the expansion of the financial system far beyond the productive base of the global economy. In short, it is one thing to say that the crisis begins to be experienced with an overabundance of unsold goods, another is to say that these unsold goods are the cause of the crisis and that therefore all crises are essentially crises of overproduction. Interpreting Marx in this way is confusing essence and appearance.

The example of the 2008 crisis allows us to talk about the role of finance. For Marx, the real dynamics of capitalist crises are internal to the process of production and accumulation of capital, so the financial sphere is not its breeding ground. Yet finance plays a fundamental role in the development of the crisis. Productive capitalists can accumulate capital above the level of reinvestment of their profits due to the production of surplus value in two additional ways: bank credit and the stock market. These two forms of financing give rise to forms of finance that tend to constantly expand beyond the money initially advanced. In the case of banks, this occurs by using part of their customers' deposits as credit, while in the case of the stock market, the value originally incorporated in the means of production is duplicated and acquires a relatively autonomous life (fictitious capital).

Finance is extremely useful in the event of a crisis. A crisis implies a lack of demand, therefore a fall in investment and consumption, and therefore a lack of means of payment. Finance can support those sectors in difficulty, even going beyond the limits of what would be possible given the productive capacity of a given system at a given time. But the injection of new credit and the provision of new loans are not free of charge: they increase debt. The more finance intervenes to delay a crisis, the more the financial flows reach a size that is disproportionate to its productive base, the more debt accumulates, and the more damage the bursting of the bubble will cause. This is what happened in 2008 according to Savran and Tonak.

There are essentially three Marxist theories to explain crises: the compression of profits, underconsumption and the fall in the rate of profit.

### ***Profit squeeze crisis***

According to this theory, crises are caused by the strengthening of workers, which would increase wages and consequently compress profits. This theory was proposed in the mid-1970s and seemed plausible: the strengthening of the welfare state and unions and the near absence of unemployment increased real wages. It is also a set of factors that can be found just before a crisis, because in this situation what is happening is precisely an exit from the growth period while wages are still increasing.

Savran and Tonak, however, show its critical points. On a theoretical level, a

change in the distribution of income in favor of the labor force can be rectified by capitalism in a relatively short period through mechanization, which increases unemployment, increases competition among workers and therefore lowers wages. On an empirical level, the theory does not hold up in 2008: wages were not high enough and the labor force was not organized enough, which is why this theory was not even mentioned.

## **Underconsumption crisis**

This is perhaps the best-known Marxist theory of crisis. It states that consumption is the driving force of the capitalist mode of production, and this is already very interesting, given that for Marx it is the production of surplus value (and therefore profitability) that drives capitalism. The underconsumptionist theory has many variations, but these all try to answer this question: Given the existence of surplus value, given that the value produced is greater than that needed to replace the capital used in production and the consumption costs of labor power involved in the production process, and given that the capitalist class does not consume the entire surplus product, who buys the goods in which the excess value is incorporated? For some, the answer may be a sort of intermediate social class, for others it is the State (whether through welfare or military spending). In this context, crises are caused precisely by the inability of the system to provide this additional demand.

Savran and Tonak criticize this theory because it ignores the Marxian concepts of simple reproduction and extended reproduction. In the case of simple reproduction, capitalists consume all the surplus value produced in the form of income. This is a purely analytical conceptual tool, since it is difficult for this to happen. The more credible hypothesis is that of extended reproduction, whereby capitalists reinvest a part of the surplus value produced. With this process of capital accumulation, new means of production and new labor force are purchased on the market, and the consumption of this new labor force is added to that of the labor force already employed. It follows that if there is an accumulation of capital, there is also sufficient demand to consume the new surplus value produced.

Since underconsumptionists miss this, their theory has two implications that Savran and Tonak consider a limitation. The theoretical implication is that whatever state the capitalist economy is in (lack of additional demand and therefore stagnation, or growth) will continue forever unless circumstances change, but underconsumptionists cannot explain why these circumstances change. The political implication, on the other hand, which Savran and Tonak consider dangerous, is to try to convince capitalists to pay higher wages and thus promote a purely reformist policy.

## **Crisis due to the falling rate of profit**

This is the theory of crisis that Savran and Tonak take their inspiration from. The mechanism of this type of crisis, as explained by Marx, occurs on two levels: one based on the relationship between capital and wage labor and the other based on competition between capitalists.

At the first level, Marx focuses on the extraction of relative surplus value through

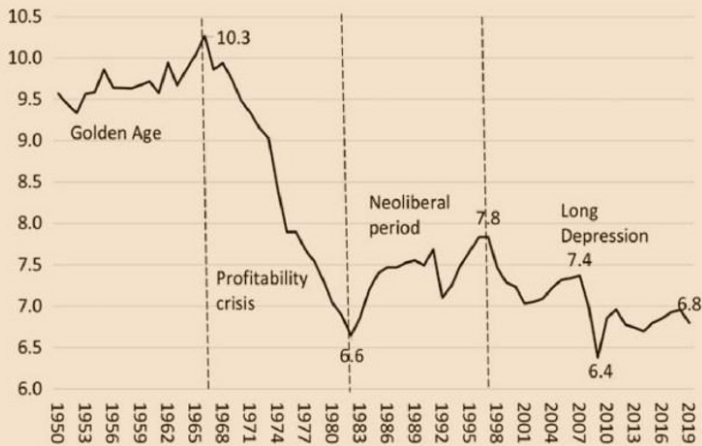
mechanization. Mechanization increases the productivity of labor, which lowers the value of labor power, thus decreasing the prices of consumer goods for the working class. Given the same length and intensity of the working day, what changes in this new situation is the internal relationship to the working day: since the labor time necessary for the reproduction of labor power has decreased, the time allotted to surplus labor necessarily increases.

It seems that everyone is winning under these circumstances, but this creates a contradiction for capital. Mechanization increases the contribution of constant capital to production, that is, it increases the volume of constant capital in relation to living labor. Constant capital then increases faster than variable capital, and since the rate of profit is the ratio between surplus value and capital, this means that the denominator increases faster than the numerator, and this decreases the rate of profit.

It is also true, however, that the numerator will not remain constant, because the extracted surplus value will also increase (and this is one of the counter-tendencies). Therefore, the outcome of the overall process will be decided by which one grows faster: whether the organic composition of capital or the productivity of labor. However, since the investment needed to extract relative surplus value increases with the purchase of increasingly advanced technology, at a certain point the organic composition of capital will overcome the counter-tendency and the rate of profit will begin to fall.

At the second level, the process is similar, but seen through the eyes of competition between many capitals. To beat its competitors and raise its market share, a company will invent new production methods or techniques to increase labor productivity. This means that the goods produced by this company will cost a lower amount of labor than similar goods from other companies, and this will allow it to lower its prices without undermining its profits. Competing companies will then be under pressure: if they continue to maintain the same prices, they will lose market share and therefore profits; if they lower their prices, they will lose their profit margins (even risking to incur losses).

The only way out of this situation is for them to adopt new production techniques at least equal to those of the innovating firm, so that they can adapt to the fall in prices and survive. The overall consequence of this technological advancement is the increase in capital expenditure (the incremental costs necessary for technological modernization) in relation to profits. Again, in the long run, the denominator exceeds the numerator and this causes the rate of profit to fall.



**Fig. 8** The rate of profit of the G20, 1950–2019 (Roberts, M. 2022; This figure is based on Penn World Tables 10.0 data. As pointed out by Roberts, this database has no distinction between productive and unproductive activities. However, it has a series called the internal rate of return on capital stock (IRR), which can be used as a good proxy for the Marxian rate of profit)

Since the fundamental goal of capitalist production is to extract the greatest possible profit from a certain amount of capital, a fall in the rate of profit will make capitalists less willing to spend on investment in new capital (accumulation) at the same rate with a better situation. This means that there is not enough surplus value extracted for expanded reproduction to continue. This type of crisis is therefore a crisis of over-accumulation. Obviously, the capitalist class and its government do not sit back and watch and try to remedy the situation through monetary, fiscal or political restructuring policies. Examples of the latter can be war economies, fascism and neoliberalism.



# An Interview with Paul Sweezy<sup>1</sup>

Sungur Savran and E. Ahmet Tonak

**E. Ahmet Tonak (EAT):** We would like to start out by discussing your lifelong activities as a socialist intellectual and author before turning to questions of theory and politics. You have, on various occasions, made clear that you turned to socialism and were convinced of its relevance for the contemporary world at the beginning of the 1930s, which means that you have been active developing and defending socialist views for more than half a century. Now it seems obvious that at least until the mid-seventies, this period was not really marked by a vitality of the socialist movement in the United States. During the Cold War period, in particular, socialism was to be down-graded and vilified by the political establishment, the mass media, the intelligentsia, etc. How would you characterize the experience of being in an extremely small minority as a socialist? Are there any significant and interesting instances of the pressures you were submitted to that you would like to evoke?

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<sup>1</sup> The following interview, was made for and appeared in 1986 in its Turkish translation in *On-birinci Tez (Thesis Eleven)*, a Marxist theoretical journal published quarterly in Istanbul, Turkey from 1985 to 1992. It was later published in English by *Monthly Review*. The interview was conducted by Sungur Savran and E. Ahmet Tonak, in Great Barrington, Massachusetts on March 20, 1986. We are republishing the interview on the occasion of the 20th anniversary of Sweezy's death (1910-2004).

***Paul M. Sweezy (PMS):** Well, of course, the period of fifty years that you mentioned has been one of great variety. The reason I first became interested in Marxism and radical ideas was because of the state of the world in the early thirties, the financial collapse, and the Great Depression, the international situation which was prelude to the Second World War. And during that decade, particularly in the United States- well not particularly, but certainly markedly in the United States- there was an upsurge of radical activity and radical thought.*

*Up to then, I would say, there was virtually no Marxism in the United States.*

*You may be familiar with the work of Thorstein Veblen. He was one of the original faculty at the New School. He was not a Marxist, but he was very strongly influenced by Marxism, and he was just about the only important U.S. social scientist of the time, of the 1920s, who had really taken Marxism seriously. There was the old Socialist Party which had developed a few interesting thinkers, particularly Louis Boudin, who was more or less in the mold of Kautsky and the social democratic theories of the German party. But he was also an original thinker. And there were a few others. But by and large, in academia anyway, Marxism was nothing of any influence whatever, and whatever was known about it or written about it was a caricature, was not serious. There was no serious Marxist tradition. When I came back from England in the fall of 1933, it had already begun to change. There was a good deal of questioning and thinking around the big universities. I was at Harvard at the time, but this was true of various other universities too. Particularly in New York, New York University, City College. During the 1930s, the Communist Party, of course, grew rapidly, and took a leading role in the organization of the working class, and the CIO, the breakaway federation from the American Federation of Labor. And generally speaking, it was a period of a great deal of not very sophisticated theoretical work, but a good deal of ferment and interest. And that was the context in which I became a self-educated Marxist. I had had a normal neoclassical training, but as a Marxist I had a problem of mostly teaching myself, and of course in conjunction with trying to absorb traditions, German particularly, and the European tradition.*

*It was during that period that I gradually wrote, over several years, *The Theory of Capitalist Development*, which was started more or less as an effort of self-clarification. I was teaching from about 1935 or 1936 a course on the economics of socialism, which we interpreted in two ways. One, as the economics of a socialist society. And two, as the economic theories of socialist movements. And in the latter, of course there were many socialist traditions, Christian socialism, Fabian socialism and so on, and Marxist. And I tried to raise the level of treatment of Marxism in that course, and in graduate courses and seminars, and found that it was a long hard struggle to overcome the traditions and inhibitions of a neoclassical training. I don't know. I can't say I was terribly successful in the early stages. It took me a long, long time before I could accept the Marxist labor value theory because I was totally accustomed to the type of thinking of marginal utility price theory, and so on. And I couldn't for a long time, I couldn't see how there could be another kind of value theory with totally different purposes. That took years. *The Theory of Capitalist**

*Development was finished soon after the war started, and was published just a few months before I went into the U.S. Army. Now by that time, I think I could call myself a Marxist, with a reasonable background in the modes of theoretical reasoning and a grounding in the classical texts. But it didn't come quickly by any means.*

**EAT:** You wrote somewhere that after the Second World War you were “duly ushered out of Harvard.” It is also known that, despite student demands, you were never granted a stable position at other American universities. Would you say a few words on the Harvard experience and other similar incidents?

**PMS:** *Well there is a certain misconception, fairly widespread I think, that I was fired by Harvard. That is not true. When I left Harvard in 1942, I went into the army and the OSS (I was taken from the Army into the intelligence apparatus, that's the predecessor of the CIA, of course). I spent most of the war years in Europe—England, France, and Germany. The fact was that I was on military leave from Harvard at that time. I was an Assistant Professor, and had a five-year contract when I left; and when I returned to the United States in 1945, the fall of 1945, I had two years more on the contract, two and a half years I think, but I decided not to go back to academic teaching. I talked with my friends at Harvard and discovered that there was no possibility of the department agreeing on my being retained with tenure, so I didn't wait. I didn't want to go back for just a couple of years at that time, and I just resigned. So, it's not true that I was ever fired, though it certainly is true that I wouldn't have been given tenure if I had stayed.*

**Sungur Savran (SS):** Was it made obvious that, well at least did you know that their reasons were political?

**PMS:** *Yeah, ideological.*

**SS:** Yes, that's what I mean.

**PMS:** *The department was sharply divided. Not between radicals and conservatives, but between those who were adamantly opposed to having any radicals in the department and those, like Schumpeter for example, who were very friendly. In fact, during the war, there was an opening that came up, a permanent tenure position came up in the economics department, and they had to appoint somebody immediately. And I was one of the two candidates who were considered for the job. The other was John Dunlop, who subsequently became a very well-known labor economist. Schumpeter was a very strong supporter of my candidacy. I was told about that later, I was away at the time in England. But partly because they needed somebody who was there and could teach during the war, Dunlop was given the job. After that, there was never any chance that they would take a Marxist.*

**EAT:** We know that, among others, you were a student of Schumpeter. It is even said that the title of your now classic *The Theory of Capitalist Development*, (TeD) was designed so as to distinguish your approach from that of Schumpeter, one of whose more important works having as title, *The Theory of Economic Development*. How would you characterize your relationship to Schumpeter, and could you evoke any personal reminiscences you have of him that may be of intellectual or political interest? In particular, what was his reaction when you were “ushered out of Harvard”?

**PMS:** *Personally, we were very close friends, although we were at opposite ends of the political spectrum. Any economist who has studied the history of economic thought in the twentieth century, will realize that Schumpeter was a unique figure. He understood the importance of Marxism. As a matter of fact, he was a contemporary of a group in Vienna which included Hilferding, Otto Bauer, and Max Adler, the leading lights of the Austro-Marxist school. He understood their intellectual significance, their importance. His own attempt at a comprehensive theory of capitalism was deliberately architected as an alternative to Marxism. In other words, he paid Marxism the compliment of understanding and recognizing that it was the most important intellectual trend of the time. That's totally different from anything in the Anglo-Saxon world, where Marxism was simply not taken seriously. It was regarded as part of something like what Keynes called an intellectual underworld, which he didn't take seriously. So personally, I was very fond of Schumpeter, and he of me, I think. Actually, I wasn't really a student of Schumpeter's. But personally, I was very much influenced by him.*

**EAT:** You didn't take any formal course with him?

**PMS:** *Well, when I came back from England, there was a small graduate seminar. Very small seminar, about four or five people, including Oscar Lange.*

**EAT:** He was there?

**PMS:** *Leontief used to come to it, and myself, and the woman to whom Schumpeter was later married. But it was very small. I never took anything else of his. Later on in the mid- thirties, for two years, I think it was two years, I was Schumpeter's assistant in his introductory graduate course in economic theory. I would assist in reading papers, consulting with the students, and the like.*

**EAT:** How about Samuelson and Solow who as students attended your postgraduate seminars?

**PMS:** No, Solow took the course I mentioned earlier, the *Economics of Socialism*. He was one of the best students I ever had, very bright and very left to begin with.

**SS:** Oh, that's interesting.

**EAT:** Yes, he said so. I listened to him at one point.

**PMS:** Oh yeah, very left for a couple of years. And then after, I don't know quite what his trajectory was, whether he did his graduate work at Harvard, but maybe he didn't. I kept in touch with Solow a little bit right after I left in the early years of the war, but he drifted very rapidly to the mainstream, and became, well, you know Solow. I think he could be called somewhat opportunistic.

**EAT:** What about Samuelson, who took the course?

**PMS:** He was never left.

**EAT:** But he was in your seminar, right?

**PMS:** Not that particular one. He wasn't yet in Cambridge at that time in 1933. He came about 1936. And he took Schumpeter's course when I was Schumpeter's assistant.

**EAT:** I see.

**PMS:** We used to have informal discussion groups from time to time. Schumpeter would be involved, but not necessarily. Visiting economists from all over the world would come to Cambridge in the 1930s, very largely because of Schumpeter's being there. He was the drawing card. Hansen was another well-known person. Lange was one of the visiting scholars and Georgescu-Roegen, you probably know them. There were a lot of visiting economists who came on Rockefeller Fellowships and spent half a year, even a year, or in Lange's case, two years, at Cambridge. Another was Eric Roll, whose specialty was the history of economic thought, and with whom you are probably familiar. The first edition of Eric Roll's *History of Economic Thought* is still, I think, a very good book. He changed it a lot in later editions. And as you know, he became a prominent civil servant in Britain. Now he is Lord Roll, head of one of the big London banking houses. He also moved to the right, but never as much as some of the others. I see Eric Roll occasionally, when he is in the United States. While he's not a radical anymore, he's not unfriendly. I mean he's not

*a Thatcherite or a Reaganite or anything like that. He's too sensible for that. He's a very able person, too.*

*For a lot of these people, and you can understand it, there was no real career to be made in the left movement. And there were many other careers to be made, the attractions were enormous, the possibilities in academia, the possibilities in government. Solow and Roll were almost paradigms of the kind of careers that were open to them. Very intelligent, bright radicals, who adjusted their politics to their jobs. It's a kind of opportunism in a way, and yet in these cases it wasn't crass or vicious. It was the kind of thing that the pressures of U.S. society make it extraordinarily difficult for a person to resist, especially if he doesn't have some independent means. You have to understand that I probably would have gone that way, too. I was fortunate in not having to depend on an academic salary. My father was a banker; as a matter of fact, he was the vice president of the First National Bank, which was one of the predecessor corporations to the Citibank now. In its day, under the leadership of George F. Baker, it was one of the leading forces in United States finance capital. Baker and J.P. Morgan were very close partners in effect. And at that time the First National Bank had only five vice presidents.*

*Today, the Citibank probably has a hundred or more. The old First National was a corporate bank, I don't think it took deposits of less than a million dollars. It had very few personal accounts, and that's one of the reasons it couldn't survive in the later period. It had to merge with the National City Bank in order to survive at all. But there was a time when it was sort of an adjunct to the Morgan empire, a part of it. And my father was upper-level management, a vice president, of the First National. He wasn't very rich. He could have been but for the crash of 1929. He was heavily involved in many of the things that went bust in 1929. So it was not as though he had a big fortune, but enough to live on. That was necessary. In the United States, if you don't have access to a little surplus value, you know, you're not going to be able to play a really independent role in the intellectual environment. So I don't blame these people in any personal sense. I try to explain it and thank my lucky stars that I was able to escape those pressures, to which so many people succumbed.*

**SS:** *Monthly Review* has rightly been called an “institution” of the American left. You started to publish it in 1949, at the dawn of the McCarthy era. Then came Monthly Review Press (MRP) in 1952. I would like to ask you two questions concerning MR. One, was it ever subjected to judicial or political repression?

**PMS:** *Well, both. The co-founder was Leo Huberman, whose books I think you are familiar with. He was a popularizer in the very best sense of the word. He wrote marvelously lucid and clear, well-informed books on the history of American democracy, We The People, and a history of capitalism, Man's Worldly Goods. He and I were the co-founders of Monthly Review. And both of us were subjected to a certain amount of harassment, by what is usually called the witch hunt aspects of*

*the McCarthy period. Leo, I think, was called once before the McCarthy Committee, and once before the Un-American Activities Committee. I was the object of a state subversive activities witch hunt in New Hampshire, where I was living at the time, which went on for four years. In 1953 I was questioned by this local state inquisition, you might call it, and actually was...well the details don't need to bother you. I was found guilty of contempt of court, and sentenced to jail. It was in 1953-54. It was immediately appealed, and the case went on until the summer of '57, when it was finally decided by the United States Supreme Court in my favor. So all that period I was out of jail on bail. The year 1957 was the peak of the liberal phase of the Earl Warren court. And on that day in June of 1957, they handed down six or eight decisions overturning several of the worst McCarthyite excesses. My case was one of them. But these had nothing to do with Monthly Review. I mean, except indirectly, there was no attack on the journal as such.*

*Neither Leo nor I had, fortunately, happened ever to join the Communist Party, although it could have happened easily enough at one stage or another. Many people joined the party in the 30s just because it seemed to be the most effective left organization of the period. They never thought of it as anything terribly important, and maybe didn't stay very long. Lots of them went through the party, and that became later on a handle which could be used to persecute people in very vicious ways. We were lucky in that they didn't have that available. Of course, people were very careful about subscribing to Monthly Review, or being seen with it. For years we had to mail it in a plain wrapper, so that folks wouldn't see it. But that kind of thing is different from a direct attack. As a matter of fact, the United States legal system has been, I would say, meticulously careful: there is a certain bias against any sort of direct censorship in the system. They don't need it. Our publications are so small, they do not pose a threat to anybody.*

**SS:** Second: How do you now, after close to forty years of publication, evaluate the contribution of MR to socialism in America and, of course, in the world at large?

**PMS:** *Well, I would think it has had much more influence outside the United States than in the United States. There is what is called a Monthly Review "school," which includes, besides Huberman and myself, Paul Baran, who was at Stanford University with tenure. Fortunately, he got tenure in 1948.*

**EAT:** He was the first American Marxist to get tenure at a big university. Is that right?

**PMS:** *Well, no, there were others, but perhaps in economics, yes.*

**EAT:** Yes, that's what I mean.

*PMS: But there were quite a lot of Marxists, more likely mathematicians and physicists. Marxism didn't interfere with their work or get them in trouble. Baran was very close to us. And Harry Magdoff, and then Harry Braverman. The main works, I suppose, are my Theory of Capitalist Development, Monopoly Capital by Paul Baran and me, Harry Braverman's Labor and Monopoly Capital and, Harry Magdoff's The Age of Imperialism. There is a recognizable tendency in American Marxism, which can be, in a rough way, said to be the Monthly Review school. I don't think it's predominant. My guess is that it definitely isn't. In the URPE, for instance, the Union for Radical Political Economics, I would say the Monthly Review tendency is a minority, a definite minority. There are many others. Anwar Shaikh's tendency is another minority tendency, and one could mention Bowles and Gintis, and others as well.*

*EAT: But they are getting to be the majority, in a way.*

*PMS: Could be, I don't know. I am not really closely associated with the URPE and its inner politics. But in any case, I think it's been useful. As you know, the U.S. Marxist movement is small, very small. Nobody can claim that it has had a major impact on American intellectual life. There's a Cold War mentality. But Marxism has a certain toehold. It's much more serious than it used to be. We take it as it comes.*

*SS: One final question concerning your career as a socialist intellectual: It is striking that a socialist of your influence and commitment should not have been involved in practical socialist politics, i.e., organizational political work. Would you tell us the reasons for this and how you feel about it when you look back over the years?*

*PMS: Well, that's not altogether true. I was involved in a lot of things in the thirties. I was very active in the Teacher's Union, and one of the founders of the Harvard Teacher's Union.*

*SS: No, what I meant to say had to do with working towards the formation of a political party. And you in fact yourself, in the piece that you wrote for the twenty-fifth anniversary of Monthly Review, did mention this sort of thing. You never went into organizational politics, especially in the sixties, when the movement was on the rise. How do you view that looking back on it?*

*PMS: I view it as sort of inevitable, because I think to have tried to join in the sixties would have been difficult. It was a young movement in the sixties, they didn't think they needed old people like us. But they did need something that could establish some continuity with the radical past, because the sixties movement had*

*little sense of history, very little sense of its own place intellectually or politically in the development of the country. And we always saw our role as trying to maintain certain radical traditions, a certain sense of history, which could not be done in any of the available existing party formations, sectarian formations. And so we tried to produce something which would be useful to all of them, if they wanted to place themselves in the historical development. And really the only serious political party was the Communist Party, plus the Trotskyists, who are a variant of the Communist Party: the parties that came out of the Third International. And they were absolutely impossible from the point of view of any intellectual creativity. I remember when I wrote *The Theory of Capitalist Development* just when it came out, friends of mine said we don't know what to think of it because Moscow hasn't said anything about it yet. Well in that kind of an atmosphere, you can't carry on serious work. Perhaps you could in England. I mean Maurice Dobb was always a member of the Communist Party, for example. And I think they left him alone. He could say what he wanted. As a matter of fact, he was a creative writer during the whole period. But that wasn't possible in the United States. That's a very complicated set of questions, and I don't really know enough about it to have a definitive opinion. I would be delighted if I thought there was a movement with a possibility for the future, to join it and play a role in it. But I don't see it. We have friends who are in the DSA. The DSA is the Democratic Socialists of America. And I can see the point of some people who find that a community, an intellectual community, is something they need. But I don't think they take it very seriously as a whole movement.*

*As far as the community part is concerned, *Monthly Review* gives us a kind of base.*

*We, Harry and I, come into the office normally once a week on Tuesdays. And there is a kind of an informal tradition now of the Tuesday lunch, a brown-bag lunch (people bring their own sandwich or coffee or whatever), which attracts people from all over the world. They come in, sit down, and discuss. This last Tuesday, for example, Eduardo Galeano, very well known in Latin America, a Uruguayan, who wrote *The Open Veins of Latin America*, published by *Monthly Review Press*. He was in New York. He came to lunch. And there was somebody else, oh, our longtime colleague, Bobbye Ortiz. She just came back from the Dominican Republic, where she had been a delegate to a Women's conference there. We get people from all over. And this establishes relationships when we go abroad. We can usually find people who have been in to see us when they have been in New York at the UN or the New School, or something like that. John Eatwell is one who comes regularly. Eric Hobsbawm comes when he's in New York, not regularly, but two or three times. MR is a kind of center in its own right, of a very informal sort, which gives us some contacts.*

*We don't have many, I wish we had more, of a grassroots variety. There really isn't a movement that provides such contacts. Harry Braverman, had he lived, might have established a close relationship with the trends and tendencies in the working-class movement. I don't know. We don't have real contacts of that kind.*

**SS:** Now I suppose you chose a conscious path of carrying on an intellectual tradition. Was that it?

*PMS: Really, I think that's the way I would say it.*

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**EAT:** Moving over to your contributions to Marxist theory, can we start out by discussing some aspects of your first major contribution, *Theory of Capitalist Development*, which dates from 1942. That book was firmly rooted, it seems to me, in the theoretical debates that went on among European Marxists such as Grossmann, Luxemburg, Hilferding, etc., and presented in fact a synthetic view of their theories (the most obvious example being your discussion of the controversy surrounding crisis theory). Postwar American Marxism, on the other hand, seemed to have isolated itself from this sort of tradition, at least until recently. Do you agree with this judgment? And if so, don't you think that this state of things is to be deplored?

*PMS: Yes, I think there is a sort of parochialism or isolationism in the American movement. But that's always been true organizationally, theoretically, and intellectually. It's always been true. I was simply trying to tie into the only intellectual tradition that existed at the time, which was the one coming down from the Second International to the Third International, and to pick out the most important thinkers like Hilferding, and Lenin of course. Lenin plays an important part as a theorist in *The Theory of Capitalist Development* and so do Luxemburg and the English to a certain extent. Dobb was probably the only really important English thinker in this tradition. I don't think of anybody else. In other words, that was the tradition which had to be brought over here and made available. Now the fact is that it hasn't been followed up, except sort of sporadically and in my opinion in a superficial way. The French fashions have a tendency to catch on from time to time. And there is a serious group at the University of Massachusetts, the Wolff/Resnick tendency. That's a kind of development I'm not too sure that I understand. It's a development of Althusserianism, French. But it's a bit of a sect in an intellectual sense, not in an organizational sense. They have followers spread around at various universities, usually very intelligent and brilliant people.*

*But the New Left movement of the 60s was pretty much anti-intellectual, attempting to develop its own theories, its own niche in the stream of radical thought and radical organization. I'm sure you know this as well as I do. In fact, in recent years, you've had more opportunity to relate to younger people than we've had.*

**SS:** One of the outstanding aspects of *The Theory of Capitalist Development* is that it was there that you first introduced into the English-language Marxist literature the

debate on the so-called “transformation problem.” It would not be wrong to see the subsequent discussion in English as deeply influenced by your manner of casting the problem. We know, on the other hand, that since the 70s there has been a new current which, basing its economic analysis on the work of Sraffa, has denied any validity whatsoever to Marx’s labor theory of value. How do you personally view the debate between the so-called “neo-Ricardians” and the defenders of Marx’s theory of value?

***PMS:** Well, let me say first, and I think it’s very important to understand this, that Sraffa himself did not see what he was doing as an alternative to Marxism, or in any way a negation of Marxism. From his point of view, this was a critique of neoclassical orthodoxy. And he made that very clear. Joan Robinson was very explicit, saying that Sraffa never abandoned Marxism. He always was a loyal Marxist, in the sense of himself adhering to the labor theory of value. But he didn’t write about that. Now that was Sraffa’s peculiarity. He started as a critic of Marshallian economics. You remember his famous article in the 1920s. He was in the Cambridge group. He fought these ideological struggles which had their center in Cambridge. He took a certain side in them, but he didn’t take it as a Marxist, but he took it as a critic of the orthodoxy of the time. Now that’s a peculiar position, but it doesn’t entitle anybody to take Sraffa and counterpose him to Marxism, as Ian Steedman does. To make out of Sraffa a whole alternative theory, in my opinion, is quite wrong and has nothing whatever to do with the real intentions of Sraffa, or certainly nothing to do with the real purposes of Marxist analysis. There is no dynamic, no development in Steedman that I can see. Thinking that it is possible to get along without a value theory (using the term in a broad sense to include accumulation theory and so on) seems to me to be almost total bankruptcy. It’s no good at all. And I don’t think anything has come of it. It was good to show the limitations, the fallacies, the internal inconsistencies of neoclassical theory, that was fine, that was important. But to think that on that basis a theory with anything like the scope and purposes of Marxism can be developed is quite wrong.*

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***EAT:** Your joint work with Baran, *Monopoly Capital (MC)*, published in 1966, was immensely influential and could be said to have given rise to a whole school of thought. It has also been the object of much controversy. One of the points made by critics is that MC is based on a theoretical structure which is at odds with the labor theory of value. In a preface written for a Greek edition of MC you explicitly state that the theory put forth in MC is not in contradiction with the labor theory of value. However, you would perhaps concede that it is based on a conception of monopoly capitalism where the competitive battle among capitals recedes to the background, to say the least. What would you have to say about this aspect of MC, especially given that the world economic crisis has once again exacerbated competition among*

capitalists and tended to break down every cartel and agreement that existed before?

*PMS: The first thing I would say there is that you have to remember the context within which Monopoly Capital was written. We started it in 1956, but it didn't actually get published until 1966. So it was in the process of development for 10 years. But the atmosphere in the mid-50s was full-fledged McCarthyism, and it was practically impossible for Marxist dialogue to exist within the U.S. academy. Baran and I were trying to introduce ideas at a level and in a language which could be effective with younger, perhaps radically inclined, economists who had no real education in Marxism, no prior acquaintance with Marx's writings. So we did use quite a lot of Keynesian and neoclassical and monopoly theory concepts like marginal revenue curves, Keynesian ideas of savings and investment as a way of analyzing the accumulation process, things of that sort. Perhaps that was a mistake. We had originally planned a couple of other chapters for Monopoly Capital which would have done more by way of explaining the relations between our conceptual framework and the Marxian value analysis. These chapters were in very rough draft, not publishable in the book or in any other form when Baran died, so there was no possibility of including them in the book. And I don't know whether they would have succeeded, or whether they were worth the attempt. But the point was that the problem of monopoly in our view was not how the surplus got produced and how it got squeezed out of the producers, the workers, but how it got divided up.*

*And in Marxist theory in Volume III of Capital, there is the whole mechanism turning around the average rate of profit and competition among capitalists of roughly co-equal status as far as their power and their control in the market was concerned. All of that, following on in the classical tradition of Adam Smith. And we wanted to argue that the distribution of the surplus was affected by the changes in the structural characteristics of capitalism beginning around the 1880s or 1890s, where the market situations were altered and the big corporations rose to dominance. We felt that these developments could be effectively analyzed without in any way implying that capital is productive of value. It was simply that the surplus was distributed according to different rules. And as a matter of fact, our argument was that the changed rules, the laws of distribution of surplus under monopoly capitalism, exacerbated rather than alleviated the contradictions of capitalism, as Hilferding and some of the social democratic economists had argued, concluding that the more organized capitalist society was less prone to crises. We argued on the contrary that it was more prone to crises and to stagnation tendencies than the more competitive models of the earlier period. So the purpose of that little introduction to the Greek edition was simply to get on the record that we really weren't abandoning Marxism by talking about surplus instead of surplus value. I have subsequently, in some instances, touched on that. You know that "Value and Prices" essay which was published in 1982, wasn't it in the Elson volume?*

**SS:** No, *The Value Controversy*.

**PMS:** Yes, *The Value Controversy*. So, I think that that criticism is very misguided on the whole; it doesn't get to the heart of the matter. Now, the second point you raised as to whether the internationalization of the economy has basically altered the tendencies which we found to be present in *Monopoly Capital*. I don't think so. Let's put it in a very extreme form. If you had a real complete multinationalization, a complete elimination of all trade barriers, there would be a relatively long period during which many monopolistic positions would be destroyed, and a new pattern of monopolistically competitive relations would be established on an international scale. But basically the laws of the concentration and centralization of capital would be unchanged, whether operating on a national, multinational, or regional scale; and you would once again have the building up of a structure similar to the one we talked about in *Monopoly Capital*.

**EAT:** Me also gives the impression that at that time you attributed great importance to Keynesian techniques of demand management. The theory of the absorption of the rising surplus through wasteful state expenditure seems to be an attempt at explaining the nature of Keynesian economic policies in Marxist terms. It is true that you later explicitly criticized the shortcomings of Keynesian policies. However, it has been said many times that you viewed Marx's contribution to crisis theory as a precursor of Keynesian analysis. Would you tell us how you would characterize your relationship to Keynes or, for that matter, the relationship of Marxist economics to Keynesianism?

**PMS:** Yeah, this is a very complicated problem, of course. I was very much influenced, as I think was my whole generation, by Keynes, by the *General Theory*. And I think that the *General Theory* is a much more important book than most Keynesians realize. I don't know if you have read it recently, most people haven't. In their student days, they read it and got certain things out of it that were mostly pretty formal, like the marginal efficiency of capital, the multiplier, the propensity to consume, all of those formal concepts. Actually there is a lot of what you might call economic sociology in the *General Theory*. I recently had occasion to read again chapter 16 of the *General Theory*, called "The State of Long-Run Expectations." It's a marvelous piece, sort of psycho-economic history. It's extraordinary. And once you read that, you cannot for a moment believe that the marginal efficiency of capital is anything but a mush. There's no reality to it, no reality whatever. It's all based on expectations, on the general climate of opinion, on the way people react to the historical context. All those things enter into it. When it gets into a formal model, you know, it's like there is a definite schedule of what various amounts of capital invested today will yield over a period of years, and what interest rate you can apply to this, and from these data you get a definite result. But there is nothing like that in what you might call a fuller development of a Keynesian set of ideas. He was also quite aware that private enterprise and the distribution which arises from the private ownership of capital was not a viable system. To be sure, he thought it

would be easy to reform the system-not easy perhaps, but that it would be possible, because he didn't have any theory of the state, any theory of power relations. He was completely blank on that. But in his perception of the problems of capitalism, Say's Law for example, and the primacy of profit-making over use values. All of that is, at least, implicitly recognized in Keynes. The thing that irritates me about Marxists is that they want to throw that all out, and the thing that irritates me about Keynesians is that they want to reduce Keynes to simple formulas. I think that is to misunderstand the importance of a very important figure. He didn't understand Marx at all, he was not at all attracted by him. But now, I think you know that at one stage, his eye was caught by the M-C-M formula. And he immediately recognized it as a conceptual way of seeing the business world which differed from that of the C-M-C formula.

**EAT:** You recently wrote about that.

**PMS:** I wrote about that in a footnote to the review of the Heilbroner book. [MR, January 1986] That just shows that Keynes's mind was working differently from the normal neoclassical economist's. He was not normal; he was a much more brilliant and more seminal thinker whom one should not be afraid to learn from. I think that Marxists have a certain defensiveness about Keynes: we mustn't take seriously a bourgeois thinker because it may infect us and maybe we'll turn out to be revisionists without wanting to be, you know. I don't think that's such a danger as long as you internalize the basic structure of Marxism, which is, of course, embodied in and summed up in the value theory and the accumulation theory, surplus-value theory, all of that. That's absolutely crucial. And most of the valuable Keynesian insights can be added to that, at least in my view. There is no need to lose these basic insights which are based on a very intimate knowledge of the real business world-which of course, Marx also had in his day. But which Marxists taking their stuff out of Capital, can't have in our day. This whole business of finance which I was talking about last night. The present financial explosion which is unprecedented can't be handled in terms of the hints in Volume III about finance. Although, they are not unuseful, not without considerable value. The whole notion of an abbreviated accumulation formula, M-M', without any production element M- C, is a very fruitful way of thinking about finance, how it is possible for M' to relate only to M without the system of production in the middle. But that's what's happening all the time now. If we don't think about this, if we assume that finance is only an aspect of the circulation of commodities, we're not going to understand a lot of what goes on in the world today. I must say, my own feeling is that this is an area where nobody has done really very well. I sometimes have the feeling that economics now is in need of a general theory, in the sense that physics seems to be in need of a general theory, i.e., that there are a lot of things that are going on that don't fit into the standard physical theories. And they are looking for a general field theory which would unify all of it. They don't have it yet. In economics, we need a theory which integrates finance and production, the circuits of capital of a financial

*and a real productive character much more effectively than our traditional theories do. I don't see that anyone is actually producing it. Some people are beginning to become aware of the need for it, but it's terribly complicated. And I'm sure that I'm too old to be able to think of those things. I can get snatches, insights here and there, but I can't put it together into a comprehensive theoretical framework. I think it will take somebody who starts differently and isn't so totally dominated by M-C-M', the industrial circuit, with the financial circuits always being treated as epiphenomenal, not part of the essential reality. I don't know if you are familiar with the book *The Faltering Economy*, edited by Foster and Szlajfer?*

**EAT:** No, I am not.

**PMS:** *Published two years ago by MR Press. The subtitle is *The Problem of Accumulation Under Monopoly Capital*. It's a collection of essays basically, but there are also some original contributions. And the ones by the young Polish economist, Henryk Szlajfer, which take off from certain ideas of surplus and surplus value as put forth in *Monopoly Capital*, are particularly interesting. He has some very stimulating thoughts, but they are not terribly clear. He's a Marxist, basically. He got interested in American thought and he's been working in Warsaw, which is quite remarkable. He certainly doesn't get much stimulation there. He's done work on Latin American underdevelopment theory, too. I think he's an important thinker. You should look at the Foster-Szlajfer book. It has a collection of useful essays by Steindl and Kalecki and some of the most important works on the development of monopoly capital theory.*

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**SS:** I wish to go into another subject. One of the pillars of your characterization of the world situation since 1945 is your assessment concerning the center of revolutionary struggles in this period. You have time and again put forth two closely related judgments: that the working classes of the advanced capitalist countries were, so to speak, integrated into the system and that the principal contradiction, to use your term, was that between imperialism and national liberation movements. You did certainly emphasize in the early 70s that the apathy of the working classes of the West was to be regarded as a transitory phenomenon. Nevertheless, it is striking, when one goes through the issues of MR in the early to mid-70s, that workers' struggles in France and Italy, in the late 60s and early 70s, the British miners' strike of 1974 which brought down a Conservative government, the Portuguese revolution of 1974-75, and the struggles of Spanish workers against the Francoist and post-Francoist state received very insufficient coverage. Would you agree that the earlier orientation of the journal acted to obstruct sufficient attention to these very significant social struggles? And how do you characterize the world situation now?

*PMS: Well, I haven't changed my mind, basically. I think the traditional Marxist theory was over-optimistic in its outlook. I think it underestimated, not only the integration of the working class into the system, but also the fragmentation of the working class, the breaking up of its component parts, which don't really relate to each other in the way that Marxists used to think of as normal. They used to think the capitalist process itself tended to homogenize the working class, bring together workers and give them certain common ways of looking at the world, a common psychology, a common class consciousness. It doesn't seem to be happening anywhere. In those places like France and Italy where it seemed maybe that the traditional model had more relevance, there the fragmentation is taking place too, the break-up of the unified working-class unions and parties seems to be advancing just as it is in Britain and the United States. I don't see any integrating tendencies. I would say there is only one place in the world today where you can speak of a capitalist development yielding a capital-labor confrontation of the classical Marxist kind, and that's South Africa, for very special historical reasons. I can see the possibility of a real proletarian revolution in South Africa, with the black working class posed against the white monopoly capital ruling class in a confrontation that would have been very familiar to Marx and Engels in their way of looking at the world. On the other hand, I think that if they woke up today and saw the United States and Britain and the other advanced capitalist countries, they would be very surprised.*

**SS:** Do you think the rather advanced countries of Latin America would be close to South Africa?

*PMS: Brazil, for example. Brazil is obviously the key to Latin America. It is so much the most important, and the most developed. Perhaps. I don't know enough to be sure.*

**SS:** To follow on from the last question and to talk further about Western Europe, one of the more heated debates of the mid-70s in the pages of MR was the discussion on what you called "the new revisionism," i.e., Eurocommunism, especially Italian style. Would you say a few words on this political current?

*PMS: Well, as you know, we were very skeptical about the importance of Eurocommunism as a new movement. We saw it more as an advance of the countries that so far didn't have social democratic parties, towards catching up with the Northern countries. Well, the United States doesn't have a social democratic party either, but in a way the Democratic Party is a kind of bad substitute for a social democratic party, a kind of welfare-state party. Eurocommunism is an abandonment of most of the really important insights, the principles of Marxist analysis of capitalism. And the Italian party today is a shambles. I don't even know if there is a faction in the Italian party that could be called Marxist in any real sense of the*

word.

*There are individuals, of course. But my perception of it now is that it has gone way beyond the original, you might say, intentions of Eurocommunism. Spain, what's left in Spain of the old Communist party where Eurocommunism got its start? There are several little parties now; the French party has disintegrated, 10 percent of the vote against 25 percent; the Italian party has become reformist in the purest sense. The "historic compromise," that was supposed to be the big Italian innovation. Compromise with what? With Christian Democracy, with capitalism. They've now carried that further, and they want to compromise with the United States, with the leadership of imperialism. They passed a resolution in the recent congress of the Italian Communist Party which, in effect, is a kind of conciliation of imperialism. Left-wing people wanted to introduce an amendment to, at least, strengthen the thing somewhat, but it was rejected at the Central Committee level. It's a shambles. Eurocommunism can't be taken seriously as a radical movement. Now whether the advanced countries are going to be capable of regaining ground, I don't know. I don't see any significant developments yet. The strength of Reaganism and Thatcherism seems to be waning: they have their own internal contradictions which are leading to their relative decline compared to what they promised, or what they might have seemed to be at one stage. But nothing is coming up in the opposition. The most recent issue of the New Left Review has a long article by Raphael Samuel on the Communist movement in Britain. It's a very sad story, and it is very moving to me. But there's nothing left.*

**SS:** In a more recent issue of *New Left Review*, Ralph Miliband characterized a similar political and intellectual drift away from Marxism in Britain (and France) in exactly the same terms as you talked about Eurocommunism, that is, he also referred to a "new revisionism." Have you seen that article of Miliband's? Have you been following these debates in Britain?

**PMS:** *I don't know. My own feeling is that the best, the most important thing that can be done in the advanced countries now is to oppose the implacable drive of U.S. Imperialism, of U.S. monopoly capitalism, to prevent any change in the third world. That is the dynamics of the world conflict. That is the area where the danger of nuclear war is germinating. And without being socialist or even consciously left, we can at least say no to that. And a lot of people are doing that and becoming conscious, at least at that very elementary level. Now that doesn't imply any great optimism about the post-revolutionary societies. But I must say that they have more potential than they have yet been able to realize, whether they are called socialist or not. I don't think it's very useful to call them socialist.*

**EAT:** That's exactly my next question. If we move further east in Europe, we could perhaps discuss your characterization of the Soviet Union and Eastern Europe. How do you view these societies? Has there been any significant change in your analysis

over the years?

*PMS: I think it's significant in the sense that they have, the Soviet Union, in the first place, of course, and China, in spite of all their disappointing developments, repellent features, they have achieved a certain relative if tenuous and insecure independence of capitalism. It's not complete independence by any means. And the Wallerstein school which tries to make it out still as a world capitalist system has a little going for it, but it isn't really useful. In fact, it obscures the real tendencies.*

*EAT: I agree with you.*

*PMS: The Soviet Union is not operating under the laws of capitalism. China isn't either, really. There the central authority can still call a halt to present policies. It may find it useful for now to use these market incentives, capitalist incentives, but that doesn't change the whole system into one of capitalism. That is a view which some of the extreme Maoists, in my opinion quite wrongly, deduce from the present situation. The Eastern European countries, some of them are quite successful, Hungary, for example, East Germany. East Germany, I don't know too much about it, but what I do hear from people whose judgment I respect is that it works a hell of a lot better than the U.S. and the Western press would like you to believe. Czechoslovakia, I don't know. I haven't seen or heard much about what is going on there. They are not third world countries, and they have a certain relative independence from capitalism. They have certain potentials which, of course, the United States is doing its very best to suppress, in the sense of making them spend all their energies on military defense. The more rational elements of the U.S. right, I think, want to believe that they can force the Soviet leaders into submission through an arms race which will become too burdensome for the Soviet Union to sustain. I think it's crazy. It's a totally incorrect perception. Nevertheless it does great damage.*

*What can a country like Nicaragua do if it has to spend 60 percent of its gross national product on war? A very poor country to begin with. What kind of development can they generate unless they get a lot of help from outside, which they don't get, of course. Even so, they don't do too badly in some respects. It's remarkable how well they do. And Cuba is another example. It's done some very remarkable things under extraordinarily difficult circumstances. If—an absolutely impossible “if,” of course—you could get the ruling classes of the advanced capitalist countries that are in the saddle in their own countries, to lay off and leave them alone, then perhaps those post-revolutionary societies would have more of a potential than most people think they do. I myself do not believe in the theory which is put forth by E.P. Thompson, for example, that the Cold War, the arms race, is essentially a two-sided affair.*

*EAT: Stretching the argument a little bit.*

**PMS:** *I think it's false. I think it's false. You can see it now. Gorbachev has had the good sense to expose the United States. The offer of complete elimination of nuclear weapons—well obviously he realizes it isn't going to be accepted—but the actual moratorium on testing is a real factor of unilateral initiative, of stopping testing and saying, "All right, you stop testing too and it'll be permanent." That's a real step. The peace movement in this country hasn't understood its importance, I think. I am surprised. I think the Soviet Union has shown more capacity to respond to a very difficult situation and to do it in a positive rather than a negative way much better than I had feared. My feeling about the Soviet Union is not as negative as it was a couple years ago. That was partly under the influence of Maoism, which I think was always wrong in its "three worlds" theory. I don't think it was ever a three-world universe. There is capitalism and then there are those who manage to get a bit of independence of capitalism, and not two systems. There is no socialist system. There are societies which call themselves socialist that are not under the regime of capital. That's all to the good, and it has possibilities. But some of us went too far in our analysis. I was very much influenced by Mao because I think he was a very great man and I think he deserved to have influence. But sometimes it's hard to know just how far to go. Take enthusiasm for the Cultural Revolution, for example. It seemed to be such a right thing to do. It seemed in an abstract sense to have all the rationality on its side. But obviously the Chinese people were not ready for that.*

**SS:** Aren't present developments proof of the fact that the Maoist leadership had not really laid the basis for a healthy workers' state? Otherwise, how could the Deng leadership follow such policies without a forcible destruction of previously existing structures and without facing serious opposition. This is, in fact, an argument which you have also used, but in criticizing the Maoist characterization of the Soviet Union?

**PMS:** *I agree with you, I totally agree with you. I think very likely, we were all living in a bit of a dream world when we imagined that the Communist movement in China had developed in the masses to the point of changing popular consciousness and class consciousness and so on. That came from other models and not from reality, I think. Mao, himself, recognized it in some of his more candid moments—in that last collection of his talks (I forget what it was called when it was finally published. The preliminary title was Mao Unrehearsed, and it contained speeches, letters, documents from the Cultural Revolution period). In some of those, he comes on understanding very well, I think, how skin-deep the Cultural Revolution really was, how it really didn't get into the masses and didn't change the masses. I don't think the failure can be blamed on Mao. What else could he do?*

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**SS:** Can we speak finally about the future prospects for socialism in the world and

in the United States? You said something on South Africa which was very important. There is also the case of Nicaragua. It seems best to start out with Nicaragua. You have always been a close observer of the Cuban experience. In light of this, what is your evaluation of the Nicaraguan revolution? Do you think that the U.S. government will try to crush the Nicaraguan revolution through direct intervention?

*PMS: You know I think the Nicaraguan revolution has to be distinguished from the Cuban revolution very clearly. The United States got caught off guard in Cuba. The Cuban revolution managed to consolidate itself with Soviet assistance before the United States understood what was happening. And from then on it meant definitely that full-scale intervention by United States armed forces would be necessary if it were to be overthrown. And the Soviet position, the dangers of nuclear war, were such that the United States, fortunately, didn't have the foolishness or the rashness to try such an adventure. Now the Nicaraguan revolution is not a socialist revolution; even by the standards of the Soviet Union, or the so-called socialist countries, it's not a socialist revolution. It has a leadership that is certainly inclined in that direction, but still 60 percent of the economy is under private ownership. All the same, from the point of view of the U.S. ruling class, it's a great danger, it's a great danger. If it survives, it's bound to have imitators not only in Central America but in South America and various other places. In that sense the "domino theory" is a realistic theory. It doesn't mean they're all going to flop into the arms of the Soviet Union, it means they're going to flop out of the arms of the United States. And that the United States won't tolerate. I think the United States is very, very wary of direct intervention, however.*

*The so-called "Vietnam syndrome" is not dead. It's not dead not only in the wide masses of the people, particularly religious people (church people are playing a wonderful role now in many areas). It's not dead in the U.S. military either. The U.S. military, the top brass, the chiefs of staff, were very badly burned by Vietnam. They don't want to get into a military adventure which will have a chance of developing into another Vietnam. Unless it has popular support, unless it is backed by the country, the minute you get into a Central American war, you're going to have a draft again. That turns a whole section of the middle class against it. In other words, this is not a simple business where we send in some troops and clean up Nicaragua. And the U.S. tactic now is to do it another way, by means of so-called "low intensity" war, which could last for a long time. And I think they will continue to pursue that option. What the outcome will be, I don't know. They're in a struggle right now in Washington, which is another chapter in this story. But it's not going to be the last chapter, by any means.*

*What is happening in South Africa now is just the beginning; it's just the beginning. That will be a very decisive struggle. I think that has the potential to become the key struggle for the rest of the century, maybe even into the next century. It could be of world significance, comparable to the Chinese Revolution in its day, tipping the balance in favor of world revolutionary struggle, if the revolution should win in South Africa. I don't know exactly what "win" means, but at least basic change in*

*social relations, which would necessarily mean a post-revolutionary black republic. Socialist, I don't know. I don't care too much whether they call it socialist or not. If it isn't capitalist, that's the important thing to me. The world has got to get out of capitalism, before we can really begin to discuss socialism. That's the big struggle, revolution versus counter-revolution. And South Africa is, in my opinion, a very key element in that struggle. I hope, let me say this, I hope that your country [Turkey] is going to become another one sometime in the not too far future.*

**EAT:** We know that the United States is the only advanced capitalist country where there is no working-class political movement with a mass basis. Given this fact, as well as the search for a meaningful left agenda, what strategy in your opinion is most likely to prove fruitful and promising?

**PMS:** *Well, I can only think now that the whole left should concentrate on defensive struggles. The working class, and the left in general, is being very strongly attacked. As you know, the union movement is disintegrating, and the standard of living of workers is being attacked. And the first necessity to get something started is to fight against that. I think it should not only be on the union front, although that's important, too, but on the political front. Harry and I have thought for a long time that the main thing should be struggles for job creation and elementary protection of the rights not only of working people but of women and minorities, blacks and so on. What is needed is a militant defensive struggle that in the course of time can take on an offensive character. Many more opportunities of a political kind will open up when the next recession comes. This I think is the only way it can be done.*

**SS:** Well, thank you very much.

**EAT:** Thank you.

