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Marx’s Theory of World History Explained: Basic Connotations and Contemporary Context

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Abstract: Marx’s theory of world history is an important part of his materialist conception of history (i.e., historical materialism). Marx and Engels summarized the evolution of social history and the laws behind it based on their observations and analyses of human activities and their material conditions in real life and raised the realistic possibility of “transformation of history into world history” in the future. From the Marxist perspective of world history, we attempt to catch a glimpse of his profound, scientific criticism of capitalism and understand the contemporaneity and super-contemporaneity of Marxism. Also, we try to perceive new issues of our time and develop a new theory grounded in the scientific, rational, and universal insights from Marxism. The study of Marx’s theory of world history and criticism of capitalism can help understand today’s major issues such as globalization and anti-globalization. In short, Marx’s theory of world history is of profound theoretical and practical significance.

Keywords: Marxism, theory of world history, criticism of capitalism, modernity

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Marx’s theory of world history is an important part of the materialist conception of history (i.e., historical materialism). Marx and Engels summarized the evolution of social history and the laws behind it based on their observations and analyses of human activities and their material conditions in real life and raised the realistic possibilities of “transformation of history into world history” and the progress of world history toward communism. They also presciently described relevant attributes of globalization and offered ideas and perspectives to help us approach contemporary society and the world. Marx’s theory of world history is also an aspect of Marxist criticism of capitalism. For both the “transformation of history into world history” and the progress of world history toward communism alike, the established logic of capital has played a positive role, while at the same time exerting a negative impact on human development. Its negative impact, which is more fundamental, is precisely what Marx criticized throughout his life. By criticizing and sublating the logic of capital, and surmounting its constraints, man can overcome estrangement, become free, conscious beings, and navigate world history toward communism.

Understanding History: Marx’s Theory of World History

Marx’s theory of world history is an important part of Marxism. However, this “world history” is not to be understood literally as “history of the world,” both because neither its disciplinary attributes nor research methods have anything to do with historiography, and because its presentation is not a linear list of historical events or a non-linear list of worldwide changes in history in the usual sense. The term “world history” in Marxist historiography has its own special connotations and must be understood in the context of the theory of world history, historical materialism, and even the theoretical framework of Marxism.

I consider The German Ideology to be the source of Marx’s theory of world history and an important part of Marxism and in this paper I explore the real meaning of “world history” in the Marxist sense.

A Holistic Examination Based on The German Ideology

From the fall of 1845 to May 1846, Karl Marx and Friedrich Engels co-authored The German Ideology, an important work of Marxism.

In this work, Marx and Engels made a critical analysis of various idealist conceptions of history held by prominent philosophers such as Ludwig Feuerbach, Bruno Bauer, and Max Stirner. On this basis, they expounded the basic ideas and fundamental principles of historical materialism. This was also the first time that Marx and Engels made a preliminary and systematic analysis of historical materialism and the theory of communism.

The term “German ideology” here refers to the German philosophy represented by the Young Hegelians at that time, and those who advocated this philosophy were called “German ideologists.” They are characterized by reversing the relationship between consciousness and existence, and the
relationship between thought and reality, seeing only from the perspective of ideological criticism while turning a blind eye to social reality, not to mention any chances of fighting against the existing system. Marx and Engels were dissatisfied with such a development status of German philosophy, and their later proposed revolutionary materialist conception of history was in stark contrast to the idealist conceptions of history advocated by the Young Hegelians. Their choice of Feuerbach as the prime target for criticism is reminiscent of a classic assertion in the Theses on Feuerbach: “The philosophers have only interpreted the world, in various ways; the point is to change it” (Marx & Engels, 2012a, p. 136). The practicability of Marxism is shown in the writing.

The materialist conception of history does not approach practice from a conceptual perspective; rather, it reveals various conceptual forms based on material practice. This is exactly what makes the materialist conception of history different from idealist conceptions of history. For Marx and Engels, the premises of a scientific conception of history can only be the real individuals, their activity, and the material conditions under which they live. Marx and Engels went on to argue for the decisive role of material production in human history. Starting from the contradiction between the productive forces and the form of intercourse, they revealed the general laws of historical evolution and predicted the historically inevitable replacement of capitalism with communism. During this process, the proletariat has its own task, that is the seizing power, abolishing private property, creating a new society, and transforming itself through struggle in practice. The creation of a new society presupposes a tremendous growth and advanced development of productive forces, and at the same time, world intercourse linked with the universal development of productive forces. After all, the communist cause can only be realized as a world-historical existence.

It is at this point that the term “world history” appears as an important provision in Marx and Engels’s argument for the laws of historical evolution (i.e., the materialist conception of history, or historical materialism). The so-called “world history” was a realistic observation by Marx and Engels of their own time and the very background of their prediction that communism would eventually replace capitalism.

The Transformation of History into World History as Required by the Logic of Capital

As aforementioned, “world history” was a realistic observation by Marx and Engels of their own time. In The German Ideology, Marx and Engels began their argument with the first premise of all human history, that is, “the existence of living human individuals” from the perspective of historical materialism.①

We must begin by stating the first premise of all human existence and, therefore, of all history, the premise, namely, that men must be in a position to live in order to be able to “make history”. But life involves before everything else eating and drinking, housing, clothing, and

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① This also draws a line with transcendental idealism by holding that the so-called premise cannot be the essence or “absolute spirit” that precedes experience but can only be living human individuals.
various other things. The first historical act is thus the production of the means to satisfy these needs, the production of material life itself (Marx & Engels, 2012a, p. 158).

The production of material life is a key premise of all human history. During production, humans begin to diversify because of the varied conditions of material production they are under. To better understand this diversification, we can compare contemporary groups with different levels of productive forces or compare different patterns of the same group in different eras with different levels of productive forces. Under varied conditions of material production, different people produce different products in their own ways, and subsequently shape their consumption customs and lifestyles. “As individuals express their life, so they are” (Marx & Engels, 2012a, p. 147).

Marx and Engels introduced the concept of “nation” to help analyze the above groups with different levels of productive forces. They argued, “How far the productive forces of a nation are developed is shown most manifestly by the degree to which the division of labor has been carried” (Marx & Engels, 2012a, p. 147). An examination of Marx’s later critiques of political economy, including Capital: The Critique of Political Economy, reveals that the division of labor is an important concept in Marxist criticism of political economy and that it is both a key factor in the development of productive forces and something to be abandoned in a communist society after the abolition of private ownership. The division of labor inevitably presents capital’s demand for appreciation and efficiency and causes the deprivation of human diversity and their enslavement by the machine as a certain link in the capitalist system. Marx’s attitude toward the division of labor reflects, to some extent, his attitude toward the logic of capital, that is, taking all positive elements into consideration, while inexorably and thoroughly criticizing its negative elements. “As long, therefore, as activity is not voluntarily, but naturally, divided, man’s own deeds becomes an alien power opposed to him, which enslaves him instead of being controlled by him” (Marx & Engels, 2012a, p. 165).

Any discussion of the division of labor inevitably leads to a discussion of world history. The logic of capital requires further division of labor, for this is the most efficient and most productive way to develop productive forces. The logic of capital also requires the transformation of history into world history, for this can help achieve the most efficient capital appreciation. Driven by its expansionist nature, capital demands that the original isolation of the separate nationalities should be destroyed by the developed mode of production and that the intercourse between various nations be increased. The more capital pushes forward, “the more history becomes world history” (Marx & Engels, 2012a, p. 168). Marx and Engels illustrated their point with an example: “If in England a machine is invented which deprives countless workers of bread in India and China, and overturns the whole form of existence of these empires, this invention becomes a world-historical fact” (Marx & Engels, 2012a, p. 168). The expansion of capital necessarily requires new world markets for raw materials, labor, as well as end products. This is the same process described in the Manifesto of the Communist Party: “The bourgeoisie has through its exploitation of the world market given a cosmopolitan character to production and consumption in every country” (Marx & Engels, 2012a, p. 404).

History has shown us that behind World War I, World War II, and colonialism hides the logic
of capital. Even in the current context of economic globalization, there is no escape from capital's demand for a world market and its insatiable desire to transform history into world history. Today's world has become world-historical in all respects, making it impossible to live and work alone without contacting the outside world. In this sense, Marx and Engels's insights proved to be prophetic.

In the era of Marx and Engels, capital coming from the West did bring about a true world history and put an end to the history of isolated development of various nations. Since human history entered the stage of capitalist society, nations, and states, through universal intercourse, have become increasingly interdependent and interactive, piecing together a holistic picture of the future of human society. In this stage, productive forces play a part. Productive forces are the fundamental driving force of historical evolution, while world history is an inevitable outcome of the development of productive forces. It is fair to say that world history, featuring supra-regionality and supra-nationality, is shaped by capital. Being universal, capital has its universal laws of operation, which do not vary according to geographical locations or national differences. This universality is also where the logic of capital lies. When capital is present as the dominant relation of production, its activity necessarily follows certain laws of development. Capital tries to build a basic social organization and economic power, centered on itself, to fulfill the ultimate objective, namely, appreciation.

In this sense, world history is an inevitable product of the development of a capitalist society. The universal development of productive forces, a universal intercourse between men, and the interaction between the two have jointly contributed to the creation and evolution of world history. This process has also witnessed the transformation of local individuals into world-historical individuals. The transformation has two aspects. One is a move from intra-regional intercourse to universal intercourse, namely, the true realization of world history. The other is an expansion of man’s essential being. Ultimately, all local individuals and their activities have become universal beings, and history has been transformed into world history.

The Evolution of World History Toward Communism

World history, which began with the universal realization of world intercourse based on modern industry, is still in progress with no end in sight. The latest development of the world remains in the stage of world history in the Marxist sense. Where does world history go from here? This is a question that Marx pondered, and is also a question that we, in the midst of world history, cannot avoid when we reflect on the meaning of life and face life squarely.

The ultimate purport of Marxism is the emancipation and full and free development of every individual. Before we can truly understand the “emancipation” and “development,” we must find out what humans are supposed to be like (i.e., the intrinsic nature of humans). The interpretation of intrinsic nature and estranged labor in Economic and Philosophic Manuscripts of 1844 can be used to help understand intrinsic nature in the Marxist sense.

In Economic and Philosophic Manuscripts of 1844, Marx summarized estranged labor
as the relation of the worker to work and to the product of his labor under private ownership. Estrangement here is relative to non-estrangement, that is, the true and original state of being. By understanding how labor is estranged by the logic of capital, we can appreciate the real meanings of labor and being human. According to Marx, labor as a free, conscious activity should be man’s intrinsic nature, but has been estranged under private ownership, becoming an external force that confines man. The estrangement of man from man happens when man is estranged from the product of his labor, from his life activity, and from his species-being. Using the concept of estranged labor, Marx analyzed and sublated estranged labor to explore why there is no real freedom under private ownership and what conditions are necessary for a free, conscious life. This is an important viewpoint of the young Marx, and it laid a solid philosophical foundation for developing the overall framework of Marxism.

Man, subject to estranged labor is fuller in form, but remains empty in content. Marx did not recognize such a metaphysical intrinsic nature. He continued to probe the existence of living human individuals and their social relations under certain historical conditions. During this process, the young Marx grew into a philosopher with mature thinking, shifting his focus from philosophical criticism to criticism of political economy. The exploration of intrinsic nature and the conception of a good life are two main topics of Marx’s discussion on the historical route of human development from the perspective of world history.

According to the logic behind the transformation of history into world history, world history will head for the final unification and integration of all national cultures, and nationality and regionality will be wiped out by capital sooner or later. Marx’s study of history started with the relationship between individuals and history. By reasoned argument, Marx concluded that the evolution of world history would end with a community of freely associated individuals, namely, communism. In this future community of freely associated individuals, or communist society, there will be no estranged labor, or division of labor, and individuals will be free from work restrictions and can engage in any (non-estranged) labor according to their interests. More specifically, they can “hunt in the morning, fish in the afternoon, rear cattle in the evening, criticise after dinner” (Marx & Engels, 2012a, p. 165). These superficial provisions are of course not sufficient to outline the entirety of communism. But the communist ideal itself rests on Marx’s criticism of capitalism. The criticism of estranged labor helps specify labor as intrinsic nature (including what it includes and excludes). It is impossible to elaborate on all the elements of communism in this paper, yet by criticizing the dehumanizing practices of capitalism, we can at least show that communism has nothing to do with those dehumanizing practices, which must be eliminated. Moreover, communism is by no means a return to the benighted past. Rather, communism requires highly developed productive forces and a community of freely associated individuals, for which reason world history becomes a necessary condition. “Communism, its activity, can only have a ‘world-historical’ existence” (Marx & Engels, 2012a, pp. 166–167). In short, communism is the Marxist answer to the course of world history.
Criticism of Capitalism from the Marxist Perspective of World History

Marx’s theory of world history explores the transformation of history into world history and reveals the basic law of social development. Marx’s anticipation of the future course of the human world has been proven by global development, and the combination of his classical theories with reality has turned out to be scientific and rational. World history, which is already a reality, is still in the process of moving toward communism. Argument for a better future cannot be separated from criticism and transcendence of the logic of capital today.

The Persistent Presence of Capital and Its Logic

Mankind is now in the stage of economic globalization, which features the domination of the logic of capital and the ubiquity of capital throughout the world. In Marx’s presupposition of the evolution of world history, the current stage is the second social form, which is based on dependence mediated by things. The domination of such a logic of capital still brings about a series of modern dilemmas such as the estrangement of labor and even the estrangement of the way of being, as criticized by Marx. Fundamentally, the inherent contradictions of capitalist society remain unresolved, and people still interact and compete with each other through private ownership. As long as the capitalist mode of production exists, it can only be an illusion to get out of modern dilemmas arising from the domination of capital. In the context of economic globalization, Marx’s criticism of capitalism, which was born more than a century ago in the era of liberal capitalism, is still wearing well, and his critical analysis of capital remains a valid basis for us to understand the reality and change in the contemporary world.

Criticism of capitalism is a major dimension of Marxism. The revelation of the evils of the capitalist mode of production, the examination of its contradictions, and the prediction of its fall are the main aspects of Marx’s criticism of capitalism. Argument for communism is one purpose of Marx’s theory of world history. Likewise, continuous criticism of the logic of capital is an ongoing task of Marx’s theory of world history through deconstructive analysis. This is also what Marx truly meant when he predicted the inevitable fall of the bourgeoisie.

Marx’s Theory of World History: A Philosophical Criticism of the Logic of Capital

Marx and Engels’ discussions of “why world history goes like this” and “where world history goes from here” were based on their realistic observation of society in their time.

Being in a capitalist society, Marx and Engels had a profound observation of how capital enslaved man. According to the Manifesto of the Communist Party, only capital is free, whereas human beings, whether industrial workers or capitalists, cannot be free by nature and can only follow the logic of capital involuntarily due to a lack of freedom of choice. The fact that social operation follows and only follows the logic of capital is the very root of all evil and misfortune in a capitalist society. To
eliminate all such evil and misfortune and understand the inevitable collapse of capitalism, we must first grasp the logic of capital, detect its inherent contradictions, explore its development law, and see the future course.

In *Capital: A Critique of Political Economy* and related manuscripts, Marx reiterated that “capital itself is the moving contradiction” (Marx & Engels, 1995, p. 405), and that “capital itself is a contradiction” (Marx & Engels, 1995, p. 542), and that “the real barrier of capitalist production is capital itself” (Marx & Engels, 2012b, p. 508). The contradiction between the socialization of production (which is required by capitalist production) and private ownership of the means of production is the fundamental contradiction of capitalism, which implies the paradox of the logic of capital and thus constitutes the inherent limits of the logic of capital. As capitalist production is a contradictory being, the process of capitalist production cannot be smooth sailing, and it must contain self-contradictions and constantly encounter the inherent limitations of development within itself. These contradictions and limitations keep being externalized so that capital encounters the “external limitations” of development in society and nature. Such “external limitations” are highlighted by conflicts between nature and society, between means and ends, between sense and sensibility, and between science and value. The capital-dominated mode of development has become increasingly unbearable for mankind and the earth, threatening human existence, and hollowing out the development potential of human civilization.

The philosophical criticism of the capitalist mode of production in Marx’s theory of world history is rooted in the inherent contradictions of capital itself. The capitalist mode of production has played a positive role in accelerating the development of productive forces, expanding the scope of communication, and transforming history into world history. But in essence, the capitalist mode of production cannot resolve its fundamental contradiction; nor can it get rid of the relationships established thereon (i.e., the relationships between humans, between man and society, and between man and nature), or “civil society”-style conflicts and confrontations arising from the seeking of selfish interests. The capitalist world order is derived in its entirety from the capitalist mode of production as the economic base. Regardless of what superstructure is built on this economic base, there is no way to break away from this internal logic, resolve its self-contradictions, or find a solution to this fundamental problem.

**Contemporary Context: Responding to Issues of Our Time with Marx’s Theory of World History**

It has been more than a hundred years since Marx and Engels proposed the theory of world history, and the world has come a long way since. As it was written in the 1848 edition of the *Manifesto of the Communist Party*, “The bourgeoisie, during its rule of scarce one hundred years, has created more massive and more colossal productive forces than have all preceding generations together” (Marx & Engels, 2012a, p. 405). Likewise, more than a hundred years after Marx,
the transformative power of capital is still on the rise, and its productive forces have increased exponentially to an unprecedented level, outweighing the combined productive forces created by all preceding generations.

For this reason, some believe that Marxism is out of date. Thanks to advanced productive forces, the Western world has entered a post-industrial era, which sees a drastic drop in the number of factories, food crises, working classes, and human sufferings and miseries. According to these people, today's technological progress is proof that Marxism has long gone and that Marxist theory has lost its appeal. But is that really the case? No, of course not. Improvements in productive forces and technologies do not naturally correspond to human progress but are more likely to create new constraints. Given that Marxism contains deep insights and criticisms of capitalism, it will never lose its validity as long as capitalism exists. Although Marx himself never used the term “modernity,” his core idea transcends time and refers directly to modernity. “Marxist thought originated from his time and transcends it. It is the essence of both the spirit of his time and the spirit of all mankind” (Xi, 2018, p. 7).

**Understanding Globalization from the Marxist Perspective of World History**

From the theoretical resources that we can draw on to understand the current world, classical Marxism (particularly Marx’s theory of world history and anticipation of the future course of the human world) is an essential part. Marx and Engels approached the “transformation of history into world history” by developing the theory of world history. According to the theory, as interactions between/among nations, states, and individuals in different regions become increasingly common, the world is developing into an organic whole characterized by a high degree of interdependence, while individuals are transforming into world-historical ones. The transformation of history into world history reveals the basic law of social development and a historical process objectively. The establishment of a world market (i.e., going global) covered by Marx’s theory of world history forces an upgrade of methodology in international relations and calls for a change in the concept of state.

Admittedly, some scholars classify Marx's anticipation of the world as a classical paradigm and hold that the theory of globalization is about a modern world beyond the imagination of classical philosophers such as Karl Marx and Max Weber. Still, Marx’s theory of world history remains helpful to the present-day study of globalization. Its significance lies not in the detailed, comprehensive analysis of the current state of globalization (apparently a mission impossible for Marxism as a historical theory), but in the prediction of the course of world history, namely, globalization, and in the provision of a methodology and a specific perspective for us to approach the issue of globalization.

The transformation of history into world history is an irresistible historical trend which moves toward communism. Marx acknowledged that world history was initiated by the bourgeoisie and that capitalism would continue to dominate for a certain historical period. However, he insisted the final stage of world history would be communism, rather than capitalism. According to Marxism, the emancipation and development of individuals is also closely related to the course of world history, and communism is essentially about the ultimate emancipation and development of the individual,
or rather, the full and free development of every individual. Modern world history shows that globalization has brought about more abundant material conditions and value choices conducive to individual development, and that globalization and the progress of communism are mutually reinforcing.

**Understanding the Anti-Globalization Movement from the Marxist Perspective of World History**

World history has made it possible for different nations and states to go beyond regionality to share the fruits of globalization. The global economic landscape, however, is undergoing a profound change. Some states have taken a narrow-minded nationalist approach to their domestic and foreign affairs in the name of national interests. They pursue anti-globalization by withdrawing from international agreements, “building walls”, and even deporting undocumented immigrants.

An analysis of the theoretical background of anti-globalization reveals a clearer picture of globalization, including its pros and cons. From the Marxist perspective of world history, the world order built by the logic of capital can only amplify class inequality which results from the logic of capital. As the control of means of production varies from class to class, power asymmetry emerges within a state. This power asymmetry spreads around the world through globalization, and subsequently results in inevitable inequality between states. By this logic of thinking, Vladimir Lenin revealed the uneven development of capitalism from the Marxist perspective of world history and contributed to the theory of imperialism, holding that the socialist revolution would take place first at the weakest link in the chain of global imperialism. Lenin for the first time ever put the theory of socialism into practice. Thereafter, Mao Zedong continued to develop Marxism by adapting the theory of world history into the context of the Chinese revolution and modernization. Mao Zedong proposed the well-known Three Worlds Theory, which revealed the basic structure of the then world system in a scientific way and built a theoretical framework for socialist China to find its place in world history.

Developing countries are necessarily at a disadvantage in globalization as these countries do not have much say, which means they do not have much influence on globalization. With the progress of globalization and the emergence of developing countries, developed countries have come to realize that globalization no longer brings them as many benefits as before, and that their share of global capital gains is declining.

Despite all that, globalization will not end in the foreseeable future. The present low tide may be reversed in the future and there is a logic behind this anticipation. World history was previously dominated by established rule-makers. When they profited hugely from their status, they thought world history was advancing in the right direction. When emerging countries grew stronger and began to compete with the established capitalist powers (i.e., established rule-makers) for interests on the stage of world history, the established rule-makers claimed the course of world history to be wrong, and then turned to nationalism, plunging global governance into a crisis. Nevertheless, Marx’s
argument on world history shows us that the evolution of world history is independent of the will of any particular nation or state, and that the evolution of world history is an inevitable choice of human history and also a methodology and worldview we should continue to adhere to.

**Conclusion**

Marx’s theory of world history is rooted in his profound insights into the capitalist mode of production and the logic of capital. It is an intellectual exploration of how history has been transformed into world history and where world history is going, and a theoretical endorsement of the value-oriented, free, conscious development sought by human beings. Marx’s theory of world history is a historical theory, with its own background and problems to be solved. Yet, this theory, featuring theoretical universality, is still wearing well in the contemporary context. This theory can be applied as a clue to help us better understand capitalism, the world, and ultimately our own orientation toward future development. Therefore, Marx’s theory of world history is of profound theoretical and practical significance.

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