Socialism

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Summary

Socialism is a large and diverse political tradition, unified by opposition to capitalism. Economically, socialists also typically support common ownership or some form of social, democratic control over the bulk of the means of production. There are various views on whether this requires central planning or is compatible with some form of market economy. Others understand socialism as a set of values, and either way, those who understand socialism in economic terms are often motivated by what they see as the ills of capitalism and the values that can be realized in a socialist society in their pursuit of these economic changes. Socialist values include ending exploitation and alienation, and replacing them with human flourishing and self-realization, community, distributive justice/equality and freedom. Some also see socialism as the way to environmental sustainability, gender equality and racial justice. The question of socialist strategy – how to achieve socialism – has often been posed as a dichotomy between reform and revolution. This inadequately captures the content of fundamental disagreements among socialists. Instead, the disagreement can be understood as varying views on the use of parliamentary democracy in a capitalist state, the pace of social change and the nature of the envisioned changes.

Key Words: Marxism; Communism; Utopian Socialism; Scientific Socialism; Karl Marx; Socialist economy; Socialist values; Distributive Justice; Exploitation; Alienation; Socialist strategy.

Introduction

Socialism is a prominent and controversial political idea. The term 'socialism' was first used in the early 1830s by followers of Owen in Britain and Saint-Simon in France (Taylor, 2009) and was later made influential by Karl Marx and Friedrich Engels, among others. Since then, socialism has been written on banners and pamphlets, discussed in treatises, described in party programs, and adopted into constitutions. The ideal of socialism has – for better or worse – influenced and shaped the lives of billions of people across the globe. Despite the collapse of the socialist project of the Soviet Union, socialism remains an influential and important political ideal. Countries worldwide still consider themselves socialist, and socialist political parties are routinely part of governments in contemporary democracies.

Historically and today, the socialist tradition covers vastly different thinkers, movements and parties, from 'social democrats' closer to the political centre to the very left on the political spectrum – often called 'communists'. Distinct forms of socialism have emerged in different times and places, and as socialism is a living political tradition, its content is continuously debated and interpreted. No encyclopaedia entry can cover every aspect of the rich and diverse socialist tradition. The more modest aim of this entry is to give the reader an overview of important features of socialism and of some important disagreements in socialist thought, along three axes of analysis: What is socialism, why do socialists want it, and how do they think one can get there. Focus will be mainly on socialism as it is developed in central classic texts of socialist thought and in subsequent literature on socialism from academic political theory and philosophy.

The section 'What Is Socialism?' discusses how socialism can be defined, and what kind of society and institutional arrangements socialists envisage. The section presents some socialist alternatives, and how they differ from each other. Under the headline 'Why Socialism?', a dual purpose is pursued: To describe key values and concerns that drive socialist critiques of capitalism, and the values that a socialist society should realize. The final section addresses the question of socialist strategy, i.e. *how* to achieve socialism. Historically, this has often been posed as a dichotomous choice between revolution and reform, but this section introduces additional nuances and discusses possible connections between the answers to the how and the what questions.

What Is Socialism? The Socialist Idea and the Socialist Society

The meaning of socialism is contested, both among those who consider themselves socialists and those who vehemently oppose any reform which moves society in what they consider to be

a socialist direction. This section first discusses how socialism should be defined and then provides some historical takes on what socialism is or should be.

Defining Socialism

Socialism is often defined as a negation of or an alternative to capitalism – modern industrial capitalism being the historical context in which socialism first rose to prominence. This first, negative characterization of socialism leaves much open, and it may be too inclusive on its own. To get closer to a definition, one must say more about how socialists understand and oppose capitalism.

Marxists often speak of socialism and capitalism as different 'modes of production', i.e. different ways of organizing society's economic activity. Erik Olin Wright (2010, p. 34) highlights two characteristic features of capitalism. The first is a particular kind of class relations between capitalists who own the means of production and workers who do not and are employed by capitalists. By 'means of production', socialists typically mean tools, machinery, buildings and raw materials (Cohen, 1978, p. 55). The second characteristic is its central mechanism of economic coordination, i.e. so-called market coordination through decentralized exchanges, coordinated by the 'invisible hand' (Wright, 2010, pp. 34–35). A third feature of capitalism often emphasized by socialists is that workers are the owners of their own labour power, something which distinguishes capitalism from other class-based modes of production such as feudalism or slavery (Marx, 1996, pp. 178–180, 749).

The first of these characteristics of capitalism points towards and clearly contrasts with one of the most common definitions of socialism, namely common ownership of the means of production. Several proponents, observers and critics of socialism have converged around this clear and simple economic or 'materialist' way of defining socialism. For instance, in the *Manifesto,* Marx and Engels say that 'the theory of the Communists may be summed up in the single sentence: Abolition of private property' (Marx & Engels, 1976a, p. 498), and Marx contrasts capitalism with a situation in which 'the material conditions of production are the cooperative property of workers themselves' (Marx, 1989, p. 88). John Stuart Mill notes that socialism involves 'joint ownership by all the members of the community of the instruments and means of production' (Mill, 1967, p. 738), and one of socialism's staunchest critics, Ludwig von Mises defines socialism as 'the socialization of the means of production' (Von Mises, 1981, p. 10). Gilabert and O'Neill (2019, sec. 1) consider the following minimal condition on a socialist society: 'The bulk of the means of production is under social, democratic control'. This condition is related to the classic definition but somewhat less restrictive, as the qualifier 'bulk

of' allows that some means of production may be in private hands, and the notion 'social, democratic control' allows for some more leeway with respect to forms of organization than just collective ownership. Thus, a market socialist economy with democratically controlled firms may count as socialist on this definition, whereas a typical social-democratic market economy with mostly private ownership, but significant redistributive policies, still falls outside it.

Other socialists, like John Roemer, think the classic definition in terms of common ownership is ripe for revision in light of the experiments with collective ownership in China and the Soviet Union (Roemer, 2017, p. 263). His response is to move to a value-based definition of socialism. Both he and Cohen (2009) have proposed value-based definitions of socialism as the realization of the two values of equality and community/solidarity. There is also a certain staleness to defining socialism in strictly economic terms. At least on the surface, it leaves out why people want socialism and are willing to struggle for it. A definition that refers to socialist values may avoid this staleness (more on this in the section 'Why Socialism?').

However, at the core of the projects of Marx, Engels, and many other socialists, is the project of providing an analysis of economy and society, and how these can be changed. Hence, a purely value-based definition of socialism with no reference to an economic element would arguably be highly revisionary – also because some socialist values might be shared by non-socialists. Instead, the economic definition may lose its staleness if the socialist can show how the economic claims of socialism are connected to the realization of certain values. Moreover, socialists may be able to respond to Roemer's worry by arguing that there are forms of socialism that conform to the minimal condition about 'social, democratic control' that have very little to do with the experience of the Soviet Union, e.g. some form of market socialism.

The reason it is difficult to define socialism is partly that the socialist tradition is quite wide; and partly that proponents of different kinds of socialism disagree fiercely on who can wear 'socialism' as a badge of honour and thus have their own interests in defining socialism in different ways. In light of these difficulties, two kinds of definitions of socialism will be proposed here. The first is a minimal definition, related to the classic economic definition and to Gilabert and O'Neill's minimal condition:

Socialism is a (family of) view(s) that hold(s) that

(a) capitalism is an economic system with significant defects, and that

(b) to eliminate (or significantly reduce) these defects, property relations should instead be organized such that the bulk of the means of production are under social, democratic control.

The narrow economic focus of this definition can be seen as both a strength and a weakness. It is a strength in that it emphasizes a core element of most socialist views. It is a weakness, because most socialists' views are much more than a thesis about property relations. These may also include views on how to change property relations, what should come instead, why this would be a change for the better, and so on. To provide an insight into the wide range of socialist aspirations, it may therefore be helpful to supplement the minimal definition with a list of aims and ideas that socialists commonly embrace, even if they are not all shared by all socialists. Schmidt (1942, pp. 5–6) presents the following list:

- Society's ownership of the means of production.
- Abolishing work-free income ('exploitation').
- The right to the full fruit of one's own labour.
- Economic freedom for the individual.
- Economic and social equality.
- Securing a minimal living standard.
- Social justice.
- The right to employment (work).
- Production for need (rather than for profit).
- Production for society's needs.
- Planned control of production and distribution.
- Full use of the forces of production. (Schmidt, 1942, pp. 5–6, author's translation)

Schmidt notes that while these 12 features are not adopted by all socialists and may not even all be compatible, they are nevertheless central sentiments shared by many socialists. The list is a mixed bag containing the classic definition in terms of social ownership, more economic claims (planning, full use of forces of production), some rights (a minimum living standard, work, the fruit of one's labour) and some values (justice, no exploitation). But arguably, the list says more about what socialism actually is than any minimal definition meant to be broad enough to cover the whole socialist family of views.

Some Varieties of Socialism

Given that different socialists offer different and more elaborate views of what socialism is, it will be helpful to enrich the discussion of the definition with some more specific examples. This section presents some central takes on and debates over what socialism is and should be from its history – some different answers to the question of what socialism is, if you will.

Needless to say, the aim is not a complete history. This limited survey focuses on the early history of socialism and debates that arose from early experiences with socialism in Europe, the U.S. and Russia.

Utopian Socialists

The first people to be described as socialists are the so-called 'utopian socialists', among whom Henri Saint-Simon, Charles Fourier and Robert Owen are typically counted. While each developed their own distinctive ideas, they all held some form of the belief that society could be organized in a more scientific way that would be beneficial to the mass of people living under the harsh conditions of industrial capitalism. Owen and Fourier both conceived of visions of socialism as communal and joyful life in small-scale communities. Owen developed plans for 'Agricultural and Manufacturing Villages of Unity and Mutual Cooperation' (Owen, 1991b, 1991c), whereas Fourier simply called his type of community 'the Phalanx'. In simple terms, these communities are everything the modern industrial city is not: They offer everyone proper housing and living conditions, varied and healthy leisure activities, communal life characterized by fellowship, and good working conditions. Fourier claims that if work is organized according to the right principles, it may become even 'more alluring than are the festivities, balls and spectacles of today' (Fourier, 1971, p. 274). Their visions of changing people's living conditions go together with a vision of how this will allow a new way of life to emerge where social ills like crime and the divisions between rich and poor are eradicated, and people can live, relate to each other, and love in new ways more concordant with human nature. They envisaged that their forms of socialism would spread through experiments with founding communities based on their ideas, which would inspire others through their success. Such communities were even quite numerous at one point, both in Europe and the U.S., but none survived over time, and a more lasting influence of the utopian socialists may be the inspiration they offered for the emergence of worker and consumer cooperatives (Beecher & Bienvenu, 1971, pp. 67–69; Claeys, 1991, pp. xvi–xxiii).

The utopian socialists were 'utopian' in several senses (cp. Leopold, 2007, pp. 221–222). They described visions of ideal societies, and moreover, they described these ideals in considerable detail or provided precise 'blueprints' of the new society, if you will (Leopold, 2005, pp. 447–449). For example, both Fourier and Owen describe the architectural layouts in considerable detail, Fourier offering specifics about where to locate workshops, library and ballrooms in the Phalanx (Fourier, 1971, pp. 240–245), and Owen recommending that housing in the village be built as a parallelogram, with communal buildings in a line across its centre

(Owen, 1991c, pp. 274–275). Moreover, when Marx and Engels described these thinkers as 'utopian', they intended this as a derogatory contrast to their own 'scientific' form of socialism (see also Cohen, 2000; Engels, 1999; Marx & Engels, 1976a, pt. III, sec. 3). The charge stings, for interestingly, the utopian socialists saw their views as following from scientific insights. Owen and Fourier both based their ideas of how to reorganize society on their particular views of human psychology (Fourier, 1971, pp. 205–232; Owen, 1991a), and Saint-Simon was confident that government and administration could be based on science as robust as the natural sciences (Saint-Simon, 2015, pp. 111–113, 207–210). The 'scientific' socialism of Marx and Engels is the theme of the next section.

Scientific Socialism

Karl Marx and Friedrich Engels are routinely considered the founders of modern socialism. Perhaps their greatest contribution to the development of socialism is their analysis of the workings of modern, industrial capitalist society. The analysis provides an explanation of many of the evils afflicting the working class – exploitation, alienated work and a dominated position in society – and understands these as systemic issues related to capitalism as such. It also provides a theory of how the current, repugnant state of affairs can and will be overcome: through a revolution the working class will wrestle power from the much smaller capitalist class, organize the ownership of the means of production and distribute the surplus value to the benefit of the many, not the few.

Marx and Engels considered their socialism 'scientific, not utopian': To them, this meant that it sprung from analyses of history and economics, as opposed to abstract speculation. Because of this approach, Marx and Engels were reluctant to describe a 'blueprint' of the future, socialist society, hereby distancing themselves from the Utopian Socialists. In the afterword to *Capital*, Marx famously confined himself to the 'mere critical analysis of actual facts' instead of writing recipes … for the cook-shops of the future' (Marx, 1976, p. 99)

The truth of the claim that Marx and Engels did not provide a blueprint for socialism hinges on what providing such a blueprint would entail. In some passages, Marx and Engels provide at least some description of their preferred alternative to capitalism. In their address to the Communist League, they say that '[f]or 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' (Marx & Engels, 1978, p. 281). Hence, the minimal definition of socialism focusing on how the means of production are owned and controlled has clear affinity with Marx and Engels' own

statements. In their depiction of the alternative to capitalism, there is indeed a socialization of the means of production. Planning of the economy is also emphasized. Engels describes how communists aim to 'take the running of industry and all branches of production in general out of the hands of separate individuals competing with each other and instead will have to ensure that all these branches of production are run by society as a whole, i.e., for the social good, according to a social plan and with the participation of all members of society' (Engels, 1976, p. 348). Elsewhere, Engels considers society consciously mastering the productive forces to common benefit akin to how electricity is destructive in lightning but benign when tamed in a light bulb (Engels, 1987, pp. 266–267).

While the need to change ownership relations is accepted in various forms among different strands of socialist thought, the degree to which planning is a necessary component of socialism has been subject to much debate. In the Marxist-Leninist interpretation, Marx and Engels have provided overall guiding principles but left it to others to fill in the finer details. This has not proved an easy task. Smolinski points out how it frustrated Lenin that Marx said so little about how to organize the planned economy (Smolinski, 1969) – a process that proved much harder than many Marxists envisioned (Kornai, 2000, p. 130).

The question of how to organize the economy under socialism has been debated extensively. The degree to which the economy should involve central planning, it should be noted, is not a disagreement between the Marxist-Leninist of the Soviet Union and social democrats in Western Europe. Lenin's The New Economic Policy (NEP) 1921-1928 gave a more prominent role to markets and private property (Nove, 1992). Alec Nove identifies how Lenin's own comments on the NEP left his successors with frustrations similar to those Lenin had with Marx. Lenin described NEP both as a development and as a retreat (Nove, 2013, pp. 78–79). But of course, which one it really was mattered for their assessment, in terms of whether NEP was something to be abandoned when circumstances would allow or something to develop further. In the end NEP was abandoned, but it is not the only example of how the role of plan and market varied within the Soviet Union (Brus & Laski, 1989; Dobb, 1970, pp. 49–50; Prout, 1985). Later economic reforms in Hungary towards a more mixed economy provides another example (Richet, 1989). Conversely, social democratic parties in the west long embraced economic planning (Attali, 1979; Hilferding, 1976; Sassoon, 2013, pp. 66–68). However, there are several concerns about the merits of a planned economy (Ellman, 2014; Kornai, 2000; Pierson, 1995), such as widespread principal-agent problems (Nove, 1990), inability to spur sufficient technological innovation (Roemer, 1994a, p. 44), and, more fundamentally, that calculating the value of the factors of production is nigh on impossible, or at least incomplete

in important aspects (Von Mises, 1935). In addition, there are problems of information in an economy without prices, and also (perhaps) problems of motivation (Grant, 2002; Ward, 1933).

Market Socialism

While some remain adamant that the planned economy is superior and/or necessary despite these criticisms (N. S. Arnold, 1992; Huberman & Sweezy, 1968, p. 86; Mandel, 1969) or can be made more democratic (Campbell et al., 2002; Devine et al., 2002; Kotz et al., 2002), a prominent alternative came to the fore in response to the problems with planning: market socialism (Desai, 2004, p. 166; Lange, 1964). The core idea of market socialism is that the socialist economy needs to incorporate elements of a market economy to function properly.

According to Hayek and Roemer, there are three stages in the development of the idea of market socialism (Roemer, 1994a, pp. 28–29). The first stage included the acknowledgement among socialist economists that they needed to use prices – in some form – to conduct economic calculations. This contrasts the view that some other more 'natural unit' could be employed, be that labour power or energy. The second stage was marked by the view that it would be possible to conduct the necessary calculations regarding the price of goods in an equilibrium, without having an actual market for these goods. In the third stage, some socialist economists conceded that there needed to be an actual market to obtain knowledge about equilibrium prices. This paved the way for the idea of market socialism. Market socialism comes in many shapes and forms (Carens, 1981; Le Grand & Estrin, 1989; Ollman & Schweickart, 1998; Roemer, 1994a; Schweickart, 2011; R. D. Wolff, 2012), but the basic tenet is that market mechanisms can be utilized for socialist purposes. On this view, there is no contradiction between having a socialist economy and a market. Having markets in goods and services means that supply and demand are allowed to influence the allocations of the factors of production. This requires competition between firms and thus is incompatible with complete state ownership and a highly planned economy. Proponents of market socialism argue that this interpretation of socialism may allow its economic arrangements to abandon what Roemer calls 'a fetish of public ownership' (Roemer, 1994a, p. 20). In a similar vein, Wolff and Resnick argue that while ownership relations were altered after the Soviet revolution, some (in many cases, the same people) continued to produce surplus value, and the real change was that someone else was appropriating it (Resnick & Wolff, 2002). Market socialism still implies changed forms of ownership and an economy distinct from capitalism. However, here the socialization of the means of production would not imply state ownership and a planned economy but rather worker-managed (Prychitko, 1991; Vanek, 1970, 1971, 1975, 1977) or worker-owned

enterprises competing on market terms. And, market socialists would stress, this might be a better way of achieving what socialists want (Buchanan, 2016; Roemer, 1994a, 1994b; R. D. Wolff, 2012).

Other socialists raise concerns that market socialism would problematically reward inborn talent in a way that conflicts with equality (Cohen, 1995b, pp. 256, 259) and undermine community (S. Arnold, 2020; Maguire, 2022; Wright, 1995). On this account, Roemer has altered his position. While not necessarily assuming that a change of human nature is necessary for market socialism to function, he has recently argued that a market socialist society must have a certain approach to how it addresses the problem facing society, one marked by solidarity (Roemer 2017).

Concluding Remarks on Varieties of Socialism

While the distinction between market socialism and planned socialism is important, it does not exhaust the possibilities of socialist economic arrangements. Alternative proposals include decentralized planned economies (Albert, 2004; Albert et al., 2002), profit-sharing initiatives, workers' funds (Furendal & O'Neill, 2022) and community wealth building (Guinan & O'Neill, 2019). Moreover, while the varieties of socialism presented in this section are all of European origin, distinct forms of socialism have developed also outside the European context. For example, Julius Nyerere, the first president of independent Tanzania, developed what he thought of as a distinctly African form of socialist, which he called Ujamaa, after the Swahili word for extended family (Morgenthau, 1963; Nyerere, 1968a, 1968b). Liberation Theology, while originating as a movement within the Catholic Church in Latin America, also draws on Marxist theory for its social analysis and critique (Dussel, 2003; see e.g. Gutierrez, 1973; Rowland, 2007).

Why Socialism? Socialist Values and Concerns

Why be a socialist and pursue the social changes socialists struggle for? A natural answer is that one thinks these changes would be good and valuable, and a natural way to explain why this is the case is to refer to values. Negatively, one can point to the vices that characterize capitalism, which socialism promises to end, and positively, one can refer to the values that socialism will realize. For many, these changes will also be in their own interest, especially if one is at the hard end of the vices of capitalism, but even those who are not may still endorse socialism out of a commitment to its values or to ending the vices of capitalism, as many have done, Friedrich Engels being one of the most prominent examples.

However, before turning to this ethical way of responding to the 'why socialism'-question, it is worth noting an established reservation which suggests that socialism is not about values at all. This reservation arguably stems from the fact that Marx saw his work as social and economic theory, not moral philosophy, and sometimes explicitly dismissed the latter (Geras, 1984, p. 50; cp. Marx, 1989, p. 84). Moreover, Marx's theory of history, historical materialism, asserts that developments in the technology and productive forces of a society are among the main drivers of history. On a strong reading, it may be read as suggesting that what kind of society we live in and the value systems we hold are ultimately determined by the level of technological development (Marx, 1987, pp. 263–264; see e.g. Marx & Engels, 1976b, pp. 36–37). This implies that the real answer to 'why socialism?' is not about values but about what kind of productive forces and technologies will make it possible, and perhaps inevitable, that society becomes socialist (Cohen, 1995b, pp. 6–12).

However, even defenders of historical materialism tend to qualify the thesis, leaving some room for the influence of other factors to have independent force in shaping society (Cohen, 1978, p. 134, see also 1983b). And not all socialists are committed to historical materialism. Moreover, the socialist tradition is full of claims condemning capitalism and advocating socialism in ethical terms, and so is Marx, perhaps despite himself (Cohen, 1983c; Elster, 1985; cp. Geras, 1984, pp. 41, 76–78). The view that socialism has no normative component is therefore not very common, but a more specific dispute, on which there has been more actual disagreement, is whether Marx condemns capitalism as *unjust*, specifically. The so-called Wood-Tucker thesis claims that the correct Marxian take on this is that inequalities under capitalism are not unfair, as they merely reflect the particular capitalist mode of production and in turn are 'justified' in a certain sense by their ability to serve capitalist production (Tucker, 2017; Wood, 1972, 2004). However, others reject this thesis (Geras, 1984; Lukes, 1985; K. Nielsen, 1988). This section elaborates on some of the core values associated with socialism – one of them being justice.

Ending Exploitation

Central to Marx's and other socialists' diagnoses of capitalism is that it is a system characterized by **exploitation** of workers by the owners of capital. Exploitation in its general sense refers to taking unfair advantage of someone (Zwolinski et al., 2022). However, Marx proposed a distinct analysis of exploitation and how it is at the core of capitalism as an economic system. This analysis starts with a puzzle: If commodities are, in general, exchanged for other commodities or money of equal value, how is it possible to end up with a profit? The answer

Marx finds is that one commodity makes this possible: labour power. The capitalist buys from the worker the right to dispose of his labour power for the full working day. The value of this commodity is determined by the labour time necessary to produce it, just as for the value of other commodities, according to the labour theory of value. In the case of labour power, this amounts to what the worker needs to take care of himself and his family. However, labour power is also a source of value, something which makes it different from other commodities. The worker can therefore produce more value in a day than what he needs to take care of himself, which is the price at which the capitalist buys his labour power. The capitalist keeps the difference, or the surplus. In other words, we can think of the working day as one part in which the worker works for himself and one in which he works for the capitalist. This appropriation of the surplus value that workers produce is exploitation in its technical, Marxian sense (Resnick & Wolff, 1989; R. D. Wolff & Resnick, 2012). And it is at the core of capitalism because it is the process whereby the owners of capital accumulate more capital using the labour power of workers who do not receive the full value of what they are producing (Marx, 1996, pp. 177–186, 196–209, 221–229). Indeed, Marx sometimes speaks of it as 'robbery' or 'theft' from the workers (Geras, 1984, pp. 43–45).

The labour theory of value, on which this analysis of exploitation relies, is highly controversial. Marginalist economists argue that the value of a good is determined not by the amount of labour necessary to produce it but by how much additional utility an extra unit of it provides. Austrian economist Böhm-Bawerk eloquently formulated this critique of Marxism (von Böhm-Bawerk, 1949). Some have responded by attempting to refine the labour theory of value (Kliman, 2007). Cohen argued that many of the original claims regarding exploitation can be maintained by shifting from labour as the source of value to labour as producing that which has value (Cohen, 1979, 1983a). Others move even further away from an account which relies on the labour theory of value. Roemer argues that exploitation can be understood through unequal property relations without reference to surplus value (Roemer, 2013, pp. 72–73), while Vrousalis argues that it is better understood as a form of domination (Vrousalis, 2013, 2021, 2022).

Regardless of how one understands exploitation, most socialists agree that its omnipresence is one of the main vices of capitalism. Conversely, the end of exploitation, of capitalists living off the work of the majority who will be allowed to benefit more fully from the value of what they produce, is one of the core values of socialism.

Ending Alienation (Flourishing, Self-realization and Community)

A second Marxist diagnosis of capitalism is that it leads to the **alienation** of work and of workers. In its general sense, alienation refers to a social or psychological ill that involves 'a problematic separation between a self and other that belong together' (Leopold, 2018). Marx's most elaborate discussion of alienation is found in the *Economic and Philosophical Manuscripts* (Marx, 1975b, pp. 270–282). It is common to distinguish in Marx four ways in which work and the worker are alienated under capitalism (J. Wolff, 2002, pp. 28–37).

The first is *alienation from the product*. Here one can distinguish two ways in which workers are alienated from the product of labour. The first is the straightforward way in which workers are alienated from the products of their labour because the products they produce through their work are not theirs. The workers have no control over or ownership in what they are making and may never even see the final products. The second, less straightforward, way in which there is alienation from products is about how 'the products of men gain an independent existence and come into opposition to their makers' (Elster, 1985, p. 100). Through their activities, people create and uphold social institutions and phenomena such as the market, ideologies and religions. While people are the actual sources and creators of these products, they may come to fail to understand how they work and to relate to them as objective realities with independent power to which one has to adapt and submit – and thus, people become separated from, and even dominated by, what are really products of their own doings (Marx & Engels, 1976b, pp. 47–48; J. Wolff, 2002, pp. 31–34).

The second way in which work and workers are alienated is *alienation in productive activity*. Marx observes how much work under capitalism consists in repetitive, simple tasks that do not involve any use of skill, and where the individual worker may not clearly see what role their work plays in the larger process. Hence, the worker becomes separated from their own work activity, merely functioning as an 'appendage to the machine' (Marx & Engels, 1976a, pp. 490–491; J. Wolff, 2002, p. 34).

The third way, closely related to the second, is *alienation from man's own species being*. The idea here is that human beings have a will as well as intellectual and creative abilities. It is part of our natural way of life to use these, and we typically do so when working in creative and deliberate ways. However, this means that when doing de-skilled and repetitive work over which the worker has little or no individual control that leads to alienation in productive activity, one is also effectively alienated from one's own species being, as one is separated from realizing abilities that are an essential part of it (Marx, 1975b, pp. 275–277; J. Wolff, 2002, pp. 34–36).

The fourth way in which work and workers are alienated under capitalism is *alienation from other human beings*, or *alienation of man from man*, a kind of separation from the fellow human beings by whom one is surrounded. This may also be seen as an alienation from a part of our species being as social creatures. Instead of seeing other people as peers, friends and members of a scheme of cooperation, people come to ignore others and live for themselves, or to see others only in their economic function as competitors, trading partners or opportunities for exploitation. Work has the potential to be an activity wherein one contributes to the good of one's fellows, which again could be the basis for some form of fellowship or community (cp. Tyssedal, 2023). When one is separated from this aspect of work, one is thus at the same time rendered separate from one's fellow's – and conversely, when separated from one's fellow's, one is also separated from this potentially valuable aspect of work (Kandiyali, 2020; Marx, 1975a, pp. 216–228, 1975b, pp. 277–278; J. Wolff, 2002, pp. 36–37).

Alienation is thus a second negative value, a second vice of capitalism, that many socialists believe can be overcome by moving to a socialist organization of society. Moreover, it is common among socialist writers to see nonalienation not merely as the absence of the bad of alienation but as a substantive, positive ideal in its own right (e.g. Jaeggi, 2014; Kandiyali, 2020). Alienated work contrasts with **self-realizing, socially contributive work** (Kandiyali, 2020)**.** Alienation from man's species being may be seen as contrasting with the value of **human flourishing through self-realization** (Elster, 1985, pp. 521–527, 1986)**.** Gilabert understands nonalienation as kind of **positive freedom**, or a 'condition in which agents successfully pursue the forms of life they have capabilities for', which is realized in a society organized to respect for **dignity** and the features that give rise to it (Gilabert, 2023, p. 220). Alienation from one's fellow human beings contrasts naturally with **community**. These contrasts to alienation can all be seen as positive socialist values. The prominent definitions of socialism in value terms of Cohen (2009) and Roemer (2017) focus precisely on the value of community or solidarity, together with justice as equality. Cohen worries that in a capitalist society characterized by private property and market transactions, people become self-serving, and valuable aspects of human relations in society are lost in a way that reminds us of Marx's worry about the alienation of man from man. For Cohen, community is essentially about the value of people caring about one another (Cohen, 2009, pp. 34–35; see also Maguire, 2022). He elaborates on two aspects of what he takes this to imply. The most clearly elaborated, and perhaps most tangible of these is what he calls 'communal reciprocity', which consists in producing for others out of a will to serve one's fellows, and be served in return (Cohen, 2009, pp. 38–45). But community also implies an element of what we may call 'common life', which

would be undermined by large inequalities (even if these inequalities were just inequalities) (Albertsen, 2019; Cohen, 2009, pp. 35–38; Furendal, 2018, 2019; Gilabert, 2012; see also Keat, 1981, for a broader discussion of the value of community; Lindblom, 2021; on Cohen and community, see also L. Nielsen & Albertsen, 2022; Vandenbroucke, 2001; Vrousalis, 2015, Chapter 5). Arnold argues that socialism is necessary for community (S. Arnold, 2020).

Justice and Equality

Despite the controversy over what Marx's view on justice really was, **justice,** and the view that capitalism is **unjust**, is a major motivation of many socialists. Wherein does the injustice of capitalism lie, precisely? And what is 'socialist justice'? A minimal justice claim that many socialists would agree to is that there is injustice in the exploitation that characterizes capitalism as this is a kind of theft, and socialist justice thus requires ending exploitation (cp. Cohen, 1995b, p. 145).

However, socialists are usually committed to a more substantive notion of justice than this. Generally, socialists strongly support the welfare state, even though the welfare state is funded by taking some of the surplus produced by each worker, something which, as also socialist writers have remarked, may at least resemble exploitation (Cohen, 1995b, Chapter 6). Moreover, the welfare state is typically responsive not only to the needs of workers but also to the needs of groups outside work for other reasons, such as illness, disability or age. Therefore, it seems plausible that most socialists endorse not only the elimination of exploitation but also a more substantive principle of justice in the distribution of the social surplus. Roemer argues for 'revising' socialism in exactly this way, i.e. replacing the classic focus on eliminating exploitation with a focus on establishing distributive justice (Roemer, 1985, 2017).

What is the socialist principle of distributive justice, then? Some socialists, for instance the proto-communist Babeuf, put forward an ideal of outcome equality (Maréchal & Babeuf, 2004). Marxist-Leninists have endorsed various equality-affirming positions. Lenin writes:

> The abolition of classes means placing all citizens on an equal footing with regard to the means of production belonging to society as a whole. It means giving all citizens equal opportunities of working on the publicly owned means of production, on the publicly-owned land, at the publicly-owned factories, and so forth….In brief, when socialists speak of equality they always mean social equality, equality of social status, and not by any means the physical and mental equality of individuals (Lenin, 1972, p. 145).

Kuusinen and Dutt suggest that the Marxist-Leninist idea of equality 'ensures that highest degree of equality under which, as Marx said, even "*distinction* in activity, in labour does not involve any *inequality*, any *privilege* in the sense of possession and consumption"' (Kuusinen & Dutt, 1963, p. 617). Hence, the socialist tradition seems to point to **equality** as the core value or basic principle of socialist distributive justice.

Cohen (2009) and Roemer (2017) suggest that the principle in question is 'socialist equality of opportunity', which Cohen describes as follows:

> Socialist equality of opportunity seeks to correct for *all* unchosen disadvantages, disadvantages, that is, for which the agent cannot herself reasonably be held responsible, whether they be disadvantages that reflect social misfortune or disadvantages that reflect natural misfortune. When socialist equality of opportunity prevails, differences of outcome reflect nothing but differences of taste and choice, not differences in natural and social capacities and powers (Cohen, 2009, pp. 17–18, italics in original).

This corresponds to the 'luck egalitarian' principle that Cohen defended elsewhere (Cohen, 1989, cp. 2008; see also Roemer, 2017, pp. 304–305). This principle was first discussed in the context of liberal egalitarian distributive justice and was developed from ideas in the explicitly liberal-egalitarian but non-socialist theories of justice of John Rawls (1999, 2001) and Ronald Dworkin (1981a, 1981b, 2000). On this principle of socialist distributive justice, there is thus significant affinity to some views on liberal-egalitarian distributive justice, although socialists may tend to interpret the implications of this principle in more radical ways than many liberals do. Cohen highlights how this principle may conflict with many contemporary inequalities, including those in ownership of the means of production (Cohen, 1995a, 2009).

Another candidate for a socialist distributive principle is the 'principle' Marx suggests may be 'inscribed on the banners' of socialist society in the *Critique of the Gotha Programme*: 'from each according to ability, to each according to need' (Marx, 1989, p. 87). The appeal of this principle may depend on how it is interpreted, as it is not immediately clear what it means to receive according to need or work according to ability. Carens (2003) defends an interpretation on which receiving according to need simply means that citizens should receive an equal share of income that they can use for their needs and wants as they see fit, once basic needs such as education, health care and accommodation for disability have been provided. Contributing according to ability, on his view, means that people have a moral duty to work to contribute to what is distributed, relative to their ability to do so, and taking the value of what they can produce to society into account, such that more contribution is expected from people with more

ability to work in more socially useful ways, but that this duty is constrained by a legitimate concern for people's own interests (see also Carens, 1981, 2014). Gilabert (2023, Chapter 3) combines the principle with a principle of dignity to produce a list of demands he takes to follow, which include opportunities for meaningful work, a duty to contribute on terms of fair reciprocity, securing basic needs, and self-determination in economic life (Gilabert, 2023, pp. 105–107; on the abilities/needs-principle, see also Gould, 2020).

There is at least one more central dimension to socialist equality, namely **the end of class society**. This is expected to result from changing property relations and ending exploitation, and may be seen as a good in its own right. It amounts to a form of **social equality**, such that social life no longer is structured by who owns, and who does not. Hence, it is closely related to, and presumably necessary, for the emergence of community as well as for ending alienation from one's fellows. Equality for socialists thus has both a distributive and a social dimension. As Gould suggests, our needs are not only material but also encompass relations and recognition (Gould, 2020). There is an interesting point of affinity with how philosophers think of (non-socialist) justice here, as some theorists have discussed a related ideal, so-called 'relational/democratic/social equality', on which justice is a matter of how people relate to each other (see Anderson, 1999; Lippert-Rasmussen, 2018; Scheffler, 2003, 2005). Sometimes, this ideal is also explicitly associated with Marx (Anderson, 2008, p. 144, 2019, pp. 2–3).

The duality of equality of a more social and more distributive kind is also found in Piketty's so-called participatory socialism. For Piketty, a just society is one that 'allows all of its members access to the widest possible range of fundamental goods' (Piketty 2020, p. 967). Some such goods are of a social variant, including 'to participate as fully as possible in the various forms of social, cultural, economic, civic, and political life' (Piketty 2020, pp. 967–68). Piketty's distributive ideal is not outcome equality but one which considers inequalities just to 'the extent that income and wealth inequalities are the result of different aspirations and distinct life choices' 'or permit improvements of the standard of living and expansion of the opportunities available to the disadvantaged' (Piketty 2020, p. 968). Piketty's rendering of these principles means that conflicts between them, and between equality and community, resurface (Albertsen & Lippert-Rasmussen, 2021; the socialist credentials and potential of Piketty's participatory socialism are discussed also in O'Neill, 2021).

Freedom

Some socialists oppose capitalism because they think that under capitalism, people are **unfree**, and socialism is necessary for people's **freedom**. On the other hand, proponents of markets and

other features commonly associated with capitalism often ground their view in the claim that markets, or capitalism, realize freedom (Friedman, 1962; e.g. Hayek, 1944). It is unsurprising that there are such conflicting claims, for freedom is a near universal human aspiration, although people may disagree on what it amounts to and what is important about it. Freedom is also the core value in some socialist critiques of capitalism (Blackledge, 2012; Cohen, 1995b; Honneth, 2016; Huberman & Sweezy, 1968, p. 7; Love, 2020; O'Shea, 2020b, 2020a; Reiman, 2014). Socialists diagnose different types of unfreedom in capitalism.

Some socialists challenge how meaningful and valuable the freedom most people have under capitalism is. Marx ironizes over this idea of freedom, noting that the worker being free to sell his labour power goes together with him being forced to do so to earn a living (Marx, 1996, pp. 186, 306). Freedom is not really valuable, unless one actually has the means and the opportunity to do something with it. Cohen analyses this as a conflict between property and freedom. What we are allowed to do freely in society is a function of our available resources, and enforcing private property is likely to deny some the freedom to do some things they care about and should have opportunities for (Cohen, 1988). Conversely, equalizing property will generalize and equalize the means to enjoy this freedom across society.

A second, socialist unfreedom-critique has to do with the *role of the state* and its coercive power. Marx and Engels describe the modern state as a 'committee for managing the common affairs of the whole bourgeoisie' (Marx & Engels, 1976a, p. 486). In other words, the state serves the interests of one class and not of the whole population. Thus, Engels suggests that once common ownership of the means of production is instated, and the rule of one class by another is ended, there will be no more need for the state as a repressive force, and the state will simply 'wither away' (Engels, 1987, pp. 267–268) This may not imply the disappearance of any kind of coordinating apparatus that the community relies on to administrate its own production, but it will be very different from the kind of coercive states we know today. Anarchist socialists have argued that any state, even a socialist one, will violate the freedom of individuals, and that the state must therefore be abolished entirely and replaced with unions based on free agreements (Bakunin, 1990; Kropotkin, 1995).

Nicholas Vrousalis (2022) argues that capitalism is characterized by *domination*, a specific kind of unfreedom. Vrousalis defines domination as 'subjection of purposiveness to the (arbitrary) choices of others', i.e. being in a relation of servitude to another (see also O'Shea, 2020a; Vrousalis, 2022, p. 43). A common and important form is the subjection of someone's labour capacity to the control of another. Exploitation takes place when someone uses their power of domination over another to extract a surplus from them and thus amounts to a

'dividend extracted from servitude' (Vrousalis, 2022, pp. 72–73). Hence, Vrousalis' socialist critique of capitalism centres on what for socialists is perhaps the first and least controversial wrong of capitalism, namely exploitation, but analyses exploitation as originating in unfreedom.

In *Mute Compulsion*, Mau similarly argues that societies structured around the profit motive entail a unique and abstract impersonal power which has important, limiting implications for those who work and reside in contemporary societies (Mau, 2023).

Ending exploitation, ending alienation, realizing flourishing, self-realization and community, justice/equality and freedom are perhaps the most common socialist values. But there are other concerns of great moral importance that fit well with socialism and motivate socialists and also distinct forms of socialist theory and critique. Three of these are presented here: ecologism or green socialism, feminism and racial justice.

Ecologism and Green Socialism

The first is **ecologism**, or environmental concern. Like socialists, many ecologists think that the economic system must be changed to realize their goals. Hence, it is perhaps no surprise that there is within socialism an eco-socialist current that considers that harm to the environment and the climate is a core vice of capitalism, and that socialism is the way to end these harms. Central to this critique is the view that capitalism and the system of competition is wasteful and draws too heavily on the earth's resources to be sustainable. Expressions of this sentiment can be found in Marx's work. In Volume I of *Capital*, Marx writes that there a 'metabolic rift' between man and nature (Marx, 1976, p. 637), and in Volume III, he states that we must hand the planet 'down to succeeding generations in an improved condition' (Marx, 1959, p. 567) According to Ben Foster, such comments show that Marx was also concerned with our relationship with nature, and that classic Marxism has more insights into these issues than parts of the contemporary debate would allow (Foster, 2000; Saito, 2017). Another important historical figure here is 'romantic' socialist William Morris, who objected to capitalism not only for the harsh living conditions it imposed on a majority of people in his day but also for how ugly it makes the surroundings in which human life plays out, in part because of its destruction of nature (and esp. Morris, 1993 [1890], his Utopian novel, see e.g. 2020a [1894], 2020b [1884], 58-66, 72-74). While it has been suggested that for Morris, it was more his 'attachment to a critical notion of beauty that moved him in an ecological direction, and which gave the importance of the "eco" to his ecosocialism' (Macdonald, 2004, p. 301), his role as an inspiration for ecosocialism is beyond dispute.

Many contemporary socialists have taken the green cause to heart. Some have been moved by the idea of sustainability as suggested by Brundtland (1987), others by the growth critique of André Gorz (1980). An important more radical contribution to the ecosocialist tradition is Kovel and Löwy's *An Ecosocialist Manifesto*. Radical socialist ends are maintained, but 'the path and the goal of socialist production' are redefined 'in an ecological framework.' Ecosocialism is developed from dissatisfaction with capitalism's inability to function in a sustainable way and inspired by the verdict that past experiences with socialism were, in various ways, similarly concerned with growth and production (Kovel & Lowy, 2001). Fraser argues that we must broaden our understanding of what capitalism is to properly understand its implications for the environment (Fraser, 2020, 2022). Others have proposed socialism without growth or even degrowth communism (Kallis, 2019; Saito, 2017, 2023).

Feminism

The second is **feminism**, or **gender equality**. Feminists oppose patriarchy, and socialists early theorized that there is a connection between capitalism and the conditions sustaining patriarchy (Engels, 2021; Lee, 2020). The relationship between the class struggle under capitalism and the struggle of women has been at the heart of theoretical debates over Marxism (or socialism) and feminism. An early point of contention was whether women had always been oppressed, as Kautsky and Bebel argued, or whether the oppression was tied to (or at least exacerbated by) the rise of capitalism, as Engels argued (Diaz, 2018). In *The Origin of the Family, Private Property, and the State*, Friedrich Engels suggests that some historical non-capitalist societies have not been characterized by gender oppression (Engels, 2021).

Another, related, point of contention is whether the struggle to end oppression of women could be fully subsumed under the struggle for socialism. According to Bebel, achieving socialism would also achieve women's liberation and end 'all barriers that make one human being dependent upon another, which includes the dependence of one sex upon the other' (Bebel, 1910). Others have doubted that winning the class struggle would be sufficient for achieving women's liberation. This has given rise to important disputes about the relationship between the struggle for socialism and the struggle for women's emancipation. Phillips surveys the way in which class-based and gender-based priorities have come into conflict (Phillips, 1987). Jones noted that the then Communist Party in the US had too much focus on the white male members of the proletariat and was insensitive to the triple oppression of black women, i.e. oppression based on race, class and gender (C. Jones, 1949; Lynn, 2014). Miller captures this: 'On the issue of gender, while the Socialist Party did endorse equal rights without regard

to gender, its leaders and most members displayed no interest in that policy' (Miller, 2003, p. 285). Hanisch similarly observed in 1969 that women's needs and experiences are often belittled even by political allies (Hanisch, 2000). The intersection of gender, class and race became a prominent issue among socialists (Davies, 2007; Davis, 1983; hooks, 2001; Lorde, 2019) and was fruitfully utilized for social analysis of a wide range of issues.

Feminist socialists have offered important insights about contemporary understandings of class struggle and society. Phillips argued that unchosen inequalities between the sexes are unjust and a core concern for socialists (Phillips, 1997). One example is that unpaid housework is primarily undertaken by women (Fraser, 2022; Huws, 2020). Federici discussed the various ways in which demanding pay for it radically breaks with the logic of capitalism (Federici, 1975) and later expanded that analysis by reflecting over notions of care (Federici, 2020). Fraser has also argued that capitalism has led to a crisis of care (Fraser, 2016, 2022). The clearest contemporary expression of socialist feminism is as an alternative to both radical feminism and socialism simpliciter (Ehrenreich, 2005; Sheivari, 2014). In Ehrenreich's influential analysis, socialist feminism aspires to be more than the mere addition of two approaches by bridging what it takes to be central deficiencies in both: insufficient attention to class and exploitation in radical feminism and insufficient attention to gender in much of the socialist tradition (Federici, 2021; Sheivari, 2014).

Racial Justice

The question of racial justice interacts in multiple ways with the struggle for socialism. When, in the black movement, some argued that the correct route to end oppression, discrimination and racisms was for blacks to not rebel, accommodate to society's discriminatory norms and tolerate inequalities such as political inequality, others, for instance WEB Du Bois, proposed a radical alternative: full political, civil and social rights for African Americans (W. Du Bois, 1911). This radical line of reasoning was, at least in principle, endorsed and embraced by many socialists (Miller, 2003).

Like women, a wide range of groups at times felt estranged by some of the priorities of the socialist movement. An important historical example is among black workers, whose plight and experiences often were not in focus. Miller writes on the socialists in the US in the late 1800s that 'the worker' was often a white man (Miller, 2003). A particularly rich source for understanding this is black women in the socialist movement (BlackPast, 2012; McDuffie, 2011), who contended that the movement failed to notice the triple oppression (C. Jones, 1949; Lynn, 2014) or triple exploitation (Patterson, 2015) faced by this group. Others stressed how

the typical understanding of the working class and their struggle ignores revolutions outside Europe (James, 1989) and the broader role of race in historical events (W. E. B. Du Bois, 2017).

In the context of racial justice, this can be understood as a conflict about how to understand the relationship between class and race (Costaguta, 2023; Wills, 2018). A central tenet among socialists in America in the early 1900s was that the struggle of the black workers was essentially similar to that of white workers. The position is often illustrated by a quote from Debs that the socialists had 'nothing special to offer' the black American. While Debs arguably held a more nuanced view (Heideman, 2018; W. P. Jones, 2008), the notion that race was, in a certain sense, subsumed under class was prevalent among socialists in the US until the First World War. This meant that the movement could focus on economic reforms and avoid pushing away those supporters who did not care much for black workers (Miller, 2003).

Many questioned this sameness. They pointed out that historical circumstances made the suffering of black Americans different from that of whites. Some still perceived the root cause to be economic. Harrison argued that race was used to divide workers (Harrison, 2023), a line of thinking which was developed further by Cedric Robinson. Robinson employed the term racial capitalism and argued that the working class is much more diverse than the traditional socialists would recognize (Robinson, 2000).

Many young radicals in the civil rights movement were reluctant to accept class-reductionism in describing the relationship between race and class (Marable, 1980). They were also swayed by thoughts of black nationalism (Pinkney, 1976). In its most extreme form, this line of thought turned the relation between class and race on its head and made race the core issue (Martin, 1986) but also inspired the idea of black nationalism where community building among blacks became a central tenant. Curiously, 'black nationalism' also has international ramifications because it is part of socialists critique of colonialism (Sivanandan, 2019) and because of the idea of a 'Black Diaspora', a black community that spans borders and continents (McDuffie, 2011, p. 17).

Why Be a Socialist?

This section has explicated the values and concerns socialists are often motivated by. Some of these concerns, like ending exploitation and alienation, are quite characteristic of socialism in particular, whereas others, such as freedom, justice, community and feminism, may be shared by many non-socialists, although socialists may interpret the value or concern in question in a distinct way. One further point should be emphasized to give a complete answer to the question: 'Why socialism?' While socialists may typically be motivated by one or more of the common

socialist values and concerns, the minimal definition of socialism in the section 'Defining Socialism' is not a claim about values but an economic claim about how the economy should be organized in terms of ownership over the means of production. This suggests that the full answer to 'why be a socialist' is that one endorses the economic claim of the minimal definition offered in the Defining Socialism section or some other specific view about what socialism is, because one is motivated by one or more socialist values and concerns and thinks the economic and institutional changes advocated by socialists are necessary, or at least a good way to realize these values and concerns.

How? The Road (or Jump?) to Socialism

The final question to be addressed in this entry has always featured prominently in socialist debate: How can socialism be achieved? Historically speaking, the split between the reformist social democrats of the Second International and the revolutionaries in the Communist International (the Third International) is important in terms of socialist strategy. One of the most important parties in the Second Internationale was the German Social Democratic Party, the SPD. Their relative electoral success in the late 1800s led some to ask: Can socialism be achieved through parliamentary means? Those who answered this question in the affirmative, the reformists, eventually became dominant both in the party and in the Second International. The revolutionaries either remained a vocal minority or joined the Third International. However, like many distinctions, the one between reformists and revolutionaries is difficult to pin down.

We suggest that the distinction between revolutionary and reformist socialism may be fruitfully illuminated by dividing it into three elements: the view on democracy, the speed of transition and political content.

The first distinction concerns the political route to socialism – revolutionary or democratic – and tracks a disagreement on the relationship to democracy. Reformists aim to use democracy to change society (i.e. seek to win a majority in democratic elections), while revolutionaries seek to achieve change by non-parliamentary means. Ralph Miliband draws a similar distinction between constitutionalist and non-constitutionalist strands of socialist thought (Miliband, 1978, 2011). While Marx and Engels are often placed squarely in the first category, reformist socialists have since argued that this could be ascribed to the conditions at the time. When labour parties are illegal, and many workers are not allowed to vote, illegal measures may seem the only road ahead. But when this is no longer the case, perhaps a different strategy should be

pursued. There is also textual evidence that supports a contextual interpretation of this kind. In his introduction to Marx's 'The Class Struggles in France' from 1895, Engel notes that:

> With this successful utilisation of universal suffrage, however, an entirely new method of proletarian struggle came into operation… It was found that the state institutions, in which the rule of the bourgeoisie is organised, offer the working class still further levers to fight these very state institutions. … Rebellion in the old style, street fighting with barricades, which decided the issue everywhere up to 1848, had become largely outdated (Engels, 1990, pp. 516–517).

However, in *The State and Revolution*, Lenin resisted a reinterpretation of the possibilities of achieving socialism/communism through electoral means. According to Lenin, the parliament is an institution of the capitalist state, and this means that there are strict limits to what can be achieved through electoral victories (Lenin, 1992). In contrast to Lenin, Bernstein, the most famous exponent of the parliamentary road to socialism (Bernstein, 1909), believed that socialism could be achieved through parliamentary means (for an important discussion of social democracy, see Przeworski, 1986).

Despite the prominence of the disagreement over democracy, there are socialist views on the route to socialism that do not map neatly onto it, and moreover, those who embrace alternative routes need not be against democracy as such. They may want their movement to be democratic, or they may just not believe that winning elections would allow for a re-arrangement of society of the kind they aspire to. The vision of socialism spreading through the emulation of successful socialist communities of the utopian socialists is one such alternative view which is just not concerned with parliamentary elections. The same can be said about the council communist tradition, which had little hope of achieving social change through elections. For them, the revolution would start and be carried through from workers' councils (Mattick, 2017; Muldoon, 2021; Pannekoek et al., 2003).

The second distinction is the envisaged timeframe for the transformation of society: quick and large-scale, or gradual small steps over time. This distinction is probably best understood as a continuum, for even the most ambitious socialist will probably have to accept that it is a significant practical challenge to change every institution of society at once, though the idea of total transformation in one go – or founding a new community – according to a socialist blueprint would be on the quick side of this continuum. Again, Bernstein supported the gradualist approach (Bernstein, 1909), whereas Marxist-Leninists' supported rapid re-organization (Lenin, 1992). Kautsky and later Gorz also argued for a rapid change as gradual

transformation would be fruitless (Gorz, 1968; Kautsky, 1902, p. 19) – see also (Mandel, 1976). In this vein Gorz introduced the idea of non-reformist reforms, which are, roughly, structural reforms which parts ways with current ways of thinking, and illuminates a path to a different society (Engler & Engler, 2021),

The third distinction pertains to the political content. The revolutionary tradition has traditionally had a more radical program demanding a greater transformation. This distinction is not meant to suggest that a certain set of policies qualifies as revolutionary and another as inherently reformist. The contents of political programs change over time – consider for example how supportive reformist socialists were of planning and nationalization at certain points in time. This third distinction is needed to acknowledge that there may be substantive programmatic differences of importance as well. While contents change over time, we can understand this distinction as one which captures the volume of social change aspired to.

Strictly logically, each possibility on the democratic dimension can be combined with any possibility on the temporal dimension and any possibility on the programmatic dimension. That said, some dimensions may seem to 'fit together' more naturally than others, such as the 'revolutionary' combination of revolution, quick and radical large-scale change or the reformist combination of democratic gradual change. However, influential socialist traditions have defied these more familiar combinations. For example, Eurocommunism was in essence an attempt to establish that a radical transformation of developed western democracies was possible through a parliamentary strategy (i.e. democratic, radical, quick). The strategy was pursued, mainly by the communist parties of Spain, France and Italy from the 1970s and onwards (Claudín, 1978; Claudin, 1980) (for an important critique, see Mandel 2016; for the Stalinist critique, see Hoxha 1980). Similarly, early variants of reformism would maintain that their democratic, gradual chance was no less radical in its political content than that offered by the revolutionaries. And some socialists will insist that the how and the what of socialism go together: A certain kind of socialism may be best realized, or perhaps only possible, along a certain route. A central point in Rosa Luxemburg's *Reform or Revolution* is that the means used dictate the changes that can be achieved (Luxemburg, 2003)

While the three distinctions presented above capture many important differences in historical and contemporary discussions about socialist thought, they are merely offered here to provide an overview. They do not exhaust the space for disagreement. The claim here is not that there are no important disagreements (strategically or otherwise) among those who would be placed similarly in our three distinctions. For instance, Lenin and Luxemburg would, using the distinctions employed above, be placed similarly due to their revolutionary, quick and

radical view on the socialist revolution. However, still they disagreed on important matters, such as national self-determination and the degree to which the revolution would reflect a spontaneity of the working class (Mattick Jr, 2017). Similarly, the strategic recommendations of council communists (Pannekoek et al., 2003) were decried as an 'infantile disorder' (Lenin, 1920).

Several important disagreements in Marxist thinking could be added here. One pertains to the nature of the capitalist state. Ralph Miliband points out that political leaders and top public employees come from an upper-class background and therefore are partial to interests of capital (Miliband, 1969). Poulantzas suggests a structural understanding of the state as objectively capitalist (Poulantzas, 1969), which Miliband found too deterministic (Miliband, 1970). The question whether the state could be swayed for socialist purposes (sometimes phrased as the extent to which it has autonomy) remains an important point of contention.

Gramsci highlighted a different aspect of socialist strategy and saw the capitalist state as having both a political and a civil element. The civil element (which Gramsci calls civil society) is where ideas and beliefs are shaped. Acknowledging this implies an important 'war of position' over ideas and beliefs (Egan, 2016), where an important task is to counter existing 'hegemony' (Gramsci, 2011), a thought later embraced by Laclau and Mouffe (2014).

Of course, debates over contemporary socialist strategy also concern questions which were rarely if ever addressed in the historical debates, such as development (Clapham, 1987; Cole, 2002), the European Union (Cockshott et al., 2010; Lapavitsas, 2018) and changing patterns of class nationally (Moody, 2017; Pierson, 1995) and in a globalized world (Negri & Hardt, 2000). Despite this, many of the disagreements highlighted by our three distinctions have remained prominent, as language of reform and revolution has remained common in thinking about the question of strategy for socialists.

Erik Olin Wright has proposed thinking of socialist strategy in a way that goes beyond the traditional revolution or reform dichotomy. He identifies five anti-capitalist strategic logics (Wright, 2019, Chapter 3):

1. Smashing capitalism: The classic revolutionary strategy of taking over the state, whether by an election or a revolution, and then transforming it into a socialist state as rapidly as possible.
2. Dismantling capitalism: The democratic socialist strategy of gaining power democratically and using this to introduce socialist reforms gradually such that the system eventually changes into socialism.

3. Taming capitalism: The social democrat strategy of pursuing policies and institutions that alleviate or neutralize the harms of capitalism, even if they do not change the system.
4. Resisting capitalism: Different ways of opposing capitalism and influencing the choices made by capitalists and political elites that do not involve attempts to gain state power, such as protests and strikes.
5. Escaping capitalism: Creating alternative institutions and environments where one avoids being subject to (at least some of) the harms of capitalism, such as workers cooperatives, democratically run workplaces, Utopian communities, and so on, which exist within the capitalist system.

He also identifies three logics of transformation: Ruptural transformation in one decisive moment, as smashing capitalism advocates; symbiotic transformation achieved by piecemeal reforms of the system, as dismantling capitalism advocates and taming capitalism may be a part of; and interstitial transformation, which escaping capitalism by building alternative institutions may contribute to, where a new system is gradually constructed in the interstices of the old (Wright, 2010, Chapters 8–10, 2019, pp. 53–59). Using these frameworks, he then argues for a strategy of *eroding* capitalism. While sceptical of the strategy of smashing capitalism, because of the historical record of the socialist revolutions in the 20th century, he suggests that socialists should combine the other four strategies and simultaneously use the state to introduce socialist policies and reforms and oppose capitalism and build socialist alternative institutions from below where the state can also be used to support these alternatives. The hope is to change the system gradually by working within the system from the top and from below at the same time (Wright, 2019, pp. 59–64).

Concluding remarks

Socialism is a diverse and living political tradition. It can be defined as a family of views that hold that (a) capitalism is an economic system with significant defects, and that (b) to eliminate (or significantly reduce) these defects, property relations should be organized such that the bulk of the means of production are under social, democratic control. The first condition is likely to be shared by all who call themselves socialists, whereas there may be some more disagreement over the second one. Moreover, socialists have had very different views on what a socialist society should look like, and what its main institutions should be, one major line of contention

being between proponents of central planning and proponents of market socialism. Socialists are typically motivated to pursue a change of system by what they see as moral ills caused by how the capitalist economy works and the values that can be realized by a socialist society. These include ending exploitation and alienation and establishing a society characterized by human flourishing/self-realization, community, justice/equality and freedom. Moreover, many proponents of concerns such as environmentalism, feminism and racial justice have found socialism a suitable framework for pursuing these causes and have developed corresponding forms of socialism. Major contentions in the socialist tradition concern the question of strategy. The traditional dichotomy of reform vs. revolution can be analysed as disagreements about the role of democracy, the pace of transition to be pursued and the content of the socialist programme. Another central disagreement concerns how to understand the capitalist state, and whether it can be used for socialist purposes or not. Some also think strategies that have often been seen as rivals can be combined to yield a more complex strategy in which socialist transformation is pursued by several, mutually supportive means.

Further Reading and Online Resources

Arnold, S. Socialism. In *Internet Encyclopedia of Philosophy*. Retrieved October 9, 2023, from https://iep.utm.edu/socialis/

Gilabert, P., & O'Neill, M. (2019). Socialism. In E. N. Zalta (Ed.), *The Stanford Encyclopedia of Philosophy* (Fall 2019). Metaphysics Research Lab, Stanford University. https://plato.stanford.edu/archives/fall2019/entries/socialism/

As the entry has emphasized, the socialist tradition is diverse, and can be presented from many different angles that differ in emphasis. The presentations in these online encyclopedias may complement the one given here.

Wolff, J. (2002). Why Read Marx Today? Oxford University Press.

This is a very good, accessible and brief introduction to Marx.

Marx, K. (2000). *Karl Marx: Selected writings* (D. McLellan, Ed.; 2nd ed.). Oxford University Press.

Marx, K., & Engels, F. (1978). *The Marx-Engels Reader* (R. C. Tucker, Ed.). W. W. Norton & Company.

Given the volume of the works of Marx and Engels, a collection of selected writings may be an excellent way to familiarize oneself with their most important and influential writings. Both of these readers are good resources for this purpose.

https://lwbooks.co.uk/marx-engels-collected-works/read-and-search-online

Marx Engels Collected Works from Lawrence and Wishart, readable online (pr November 2023).

https://www.marxists.org/

Online resource which includes many of the works of Marx and Engels as well as texts by many other socialist thinkers available for free in several languages.

http://users.sussex.ac.uk/~sefd0/bib/marx.htm

A Marx bibliography maintained by Andrew Chitty (University of Sussex)

Elster, J. (1985). *Making Sense of Marx.* Cambridge University Press

A comprehensive discussion of Marx's views and many of the key concepts.

Wood, Allen W. 2004. *Karl Marx*. 2nd ed. New York: Routledge.

Kołakowski, Leszek. 2008. *Main currents of Marxism: the founders, the golden age, the breakdown*. New York London: W. W. Norton.

An intellectual history of Marxists thought, which covers a very wide range of thinkers and traditions.

Cohen, G. A. (2000). If You're an Egalitarian, How Come You're So Rich? Harvard University Press.

An influential discussion of what socialism is and should be and how it relates to egalitarian liberalism .

Wright, E. O. (2010). *Envisioning Real Utopias*. Verso.

An analysis and discussion of how to realize a socialist alternative to capitalism.

Wright, E. O. (2019). How to be an Anti-Capitalist in the 21st Century. Verso.
A brief, accessible introduction to what socialism is and why and how to oppose capitalism, building and developing on Wright's earlier work.

Roemer, J. (2017). Socialism Revised. *Philosophy & Public Affairs* 45 (3): 261–315. https://doi.org/10.1111/papa.12089.
An good discussion of why one may want to understand socialism in value terms.

Federici, S. (2021). *Patriarchy of the Wage: Notes on Marx, Gender and Feminism*. PM Press/Spectre
Critical discussion and rethinking of Marx's work from a socialist feminist perspective.

Luxemburg, Rosa. 1970. *Reform or revolution*. Pathfinder Press; New York, NY.
A key text in the debate between reformists and revolutionaries.

Du Bois, William E. B. 1986. *Writings*. Edited by Nathan Irvin Huggins. The Library of America 34. New York, NY: Literary Classics of the United States.
This selection of Du Bois work contains his most important books and speeches. Thus, it contains essential reflections on slavery and the conditions of black people in the US.

Heideman, Paul M., ed. 2018. *Class struggle and the Color Line: American Socialism and the race question 1900-1930*. Chicago, Illinois: Haymarket Books.
An excellent collection of primary texts and commentaries on the debate about socialism and the organization of people of colour in the US.

Ollman, Bertell, and David Schweickart, ed. 1998. *Market Socialism: the debate among Socialists*. New York: Routledge.
A collection of essays on the merits of market socialism

Sassoon, Donald. 2013. *One hundred years of socialism: The West European left in the twentieth century*. IB Tauris.
A comprehensive history of socialism in Western Europe.

Przeworski, A. (1985). *Capitalism and social democracy*. Cambridge University Press
An important discussion of what social democracy is, whether it is the strategy socialists should pursue, whether it is what workers really want, and the extent to which it should be seen as a compromise or not.

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