

ON THE VALIDITY OF ONE SOCIOLOGICAL THEORY

A b s t r a c t

The content of this paper includes an analysis of basic principles and validity of the Marxist sociological theory. In the Introduction, there is explained a problem of acquiring knowledge as well as the possibilities of establishing theories in social sciences, with a special attention paid to the possibility of gaining unconditional truth and question about an influence that personal values can perform in the work of a scientist. In the second part of the paper, there are given the basic principles of the Marxist social theory, there are explained the ideas of class-struggle, bourgeoisie economy and capitalistic type of property with the origin and type of functioning of the proletariat and historical necessity of establishing a classless society. The third part of the paper establishes a critique of Marxist sociology from the standpoint of its scientific validity. A special attention is paid to the way of functioning its basic principles and the problem of establishing the unquestionable facts in social sciences. In the conclusion, it is explained the substantial difference between science and ideology, and, it is indicated the necessity of establishing unconditional criteria for the recognition of scientific facts.

Keywords: *scientific theory, Marxism, class-struggle, hypothesis, ideology*

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Introduction

If we are to determine the value of a scientific theory, the basic question we must answer is the question of the limits of its validity. One scientific theory is valid to the extent that it is possible to determine the correctness of its assumptions, laws, and measures. However, the correctness of a scientific theory can be confirmed and refuted only by reality, in spite of its formal justifiability. There are also limits that reality puts to some scientific theories, such as the case with Newton's theory as well as Einstein's Theory of Relativity, which needed to be established.¹ If the natural sciences, dealing with the objective world, have their limits of validity, one may reasonably ask, how this problem is more complex in the field of social sciences basically examining the acts of free human will as an objective factor?

The aim of this paper is examining the limits of validity of one sociological theory, and explaining why, despite being a formally-properly conceived system of cause-and-effect relationships with obvious social impact, this theory does not have a capability to be called a scientific theory in the true sense of the word, and its truthfulness remains in the sphere of ideological acceptability. If one social theory intends to be a part of scientific knowledge, whose theoretical hypotheses can be objectively proven, it is of the utmost importance to diminish the influence of personal values of a scientist creating such a theory.

As it is well known, in the sciences, during the formulation of a theory, it is necessary to set the hypotheses, and (if it is possible) to quantify measures, test and perform experiments, so the theory can be confirmed or refuted in the conditions of the objective reality. When two scientific theories have the same explanatory power (as it was the case in the Middle Ages with the Ptolemy and Copernicus's theory of the movement of celestial bodies), the theory, which can explain the phenomena in reality in a simpler way, becomes accepted. This rule is called the Principle of Simplicity or "Occam's razor."² In some sciences, the existence of very different, even conflicting theories is quite possible, but it is not possible to refute or suppress one theory by another one.³ This is the case in psychology, where Freud and Jung's, behavioural and cognitive personality theories stand side by side, although they have quite different theoretical

¹ About scientific paradigm shift see Kun, T., (1974). *Struktura naučnih revolucija*, Beograd, Nolit, pp. 128-129

² Novaković, S., (1984). *Hipoteze i saznanja*, Beograd, Nolit, p. 115.

³ About problem of theoretical pluralism see Berberović, J., (1990). *Filozofija i svijet nauke*, Sarajevo, Svjetlost, p. 14.

postulates. The criterion of their correctness, however, lies in their applicability in psychotherapy, and since all these theories produce the proven results, each of them has some value. On this basis, we can assume that in some, primarily social sciences, it is possible to establish the simultaneous existence of multiple competing theories without the possibility of their refuting.⁴ In this sense, the answer to the question – “whether it is possible in sociology, as a social science, to establish an indisputable theoretical framework for establishing scientific facts through which we can successfully criticize competing theoretical viewpoints?” will be also one of the goals of this paper.

The Basic Principles of the Marxist Sociological Theory

It is an indisputable fact that the Marxist theory of society is one of the most influential sociological theories of the 19th and 20th centuries. Some echoes of this theoretical current are still present today. As a theoretical and scientific point of view, Marxism was an inspirer of great social changes and social movements. The October Socialist Revolution was the first successful attempt to put the Marxist theory into practice, and the Command economy became an economic model based on it. What is the basic viewpoint of this theory? First of all, we should pay attention to the first sentence of the Communist Manifesto, a program text written to simply outline the basic tenets of the Marxist theory of social movements - “The history of all hitherto existing society is the history of class struggles.”⁵ Human society is divided into classes whose interests are irreconcilable, and the inevitable consequence of this division is a class struggle.

The carrier of the development within the Marxist theory of society is not an individual, but the society and conditions governing it. Depending on their class, each individual takes his or her place in advance in the struggle to subjugate the opposing class. The confrontation of the patricians - plebeians, nobles - citizens, bourgeois - proletarians, the subjugation of one class by another and the possessing and disposition of the values obtained by the work of the subordinate class is an inevitable process in the history of human society. In that process, each subordinate class aims to take power and put those values under its own control. That is the essence of the class struggle. The value produced by

⁴ This view is represented by the influential contemporary sociologist Anthony Giddens, see Giddens, A., (2007). Sociologija, Beograd, Ekonomski fakultet, p. 682.

⁵ Marx, K., Engels, F., (1947). Komunistički manifest, Beograd, Borba, p. 31 (Pagination of the quotes has been given according serbo-croatian version of the text. In this paper authors used english translation of *The Communist Manifesto* posted on the *Marxists Internet Archive* (marxists.org))

a subordinate class is appropriated and exploited by a superior class by its own will. In rise to power, the subordinate class uses the existence of its more sophisticated means to become a bearer of a more modern mode of production and change of the relations in the society. From the position of the superior class, it creates social relationships which will enable a complete control of the results of labour. It establishes new relations of property.⁶

Marx and Engels emphasize that the development from one to another form of a class society is unavoidable, and that human society is destined to pass all stages. The last, most developed stage of a class society, which by its economic order abolishes all forms of ownership that existed before, is capitalism. In old types of societies, there existed more classes opposing one another. Capitalism radicalizes the class struggle by reducing the whole society to only two classes - the bourgeois and proletarians. The proletarians are manufacturers who invest their work in manufacturing, but they do not own the results of their work. The capitalists have a complete ownership on the means of production and produced values. They use one part of these values to preserve the working capacity of the proletarians and the rest spend by their own volition.

Unlike the previous social systems in history, where the immutability of the means of production was a necessary condition for the exploitation by the ruling class, the bourgeoisie is forced to preserve its property by the continuous advancement of production, improvement of working tools and expanding market for its own products. By increasing the bourgeois property, all older forms disappear. At the end, the society becomes divided into those who hold the power over the means of production in their hands, and those who have no property other than their own labour.⁷ The bourgeois form of ownership increases the expansion of production, which also changes the social order.

The authority of the bourgeois class presupposes a free competition in which the one with more advanced means of production concentrates the

⁶ “We see then: the means of production and of exchange, on whose foundation the bourgeoisie built itself up, were generated in feudal society. At a certain stage in the development of these means of production and of exchange... the feudal relations of property became no longer compatible with the already developed productive forces; they became so many fetters. They had to be burst asunder; they were burst asunder.” Marx, K., Engels, F., (1947). *op. cit.*, p. 36.

⁷ “The worker becomes poorer the more wealth he produces, the more his production increases in power and extent. The worker becomes an ever cheaper commodity the more commodities he produces. The devaluation of the human world grows in direct proportion to the increase in value of the world of things. Labour not only produces commodities; it also produces itself and the workers as a commodity and it does so in the same proportion in which it produces commodities in general. This fact simply means that the object that labour produces.” Marx, K., (1992). *Early Writings*, London, Penguin books in association with New Left Review, pp. 323-324.

increasing property in his hands. However, the continuous development of the means of production eventually leads to the conditions in which the bourgeois form of ownership becomes an obstacle for itself. The goal of the capitalists is to increase their capital. But, by a continuous increase, they put capital into the condition to be devalued and disappeared. The increasing and increasing mass of the products become less and less valuable.

On the other hand, the capitalists, with its constant development of the means of production reduce the workers to a mere tools. The capitalist social system absorbs the subordinate to such an extent that they can be determined only as a part of the work process. The increasingly complicated organization of production, at the same time produces those which, apart from their work, have no other property - the opposing class, the proletarians. Thus, capitalism by its expansion unites all of humanity in order to subordinate it to its own interests. In this way it creates a certain type of man whom it exploits. The more fully the power of capitalism spreads, the more profound the character of the proletarian is. Capitalism, whose sole aim is to maximize production in order to increase capital, erases all national, religious and geographical differences. Humanity becomes united for the benefit of capital. The proletarian used in fulfilling this aim, loses all other determinants except to be a tool of the capitalist.

Obviously, all values in a society are subordinated to ensure a complete exploitation by the ruling class. Who is the proletarian? It is a human being who has no other property than his own labour. His goal is not to seize the power over the means of production to become a capitalist, his aim is to abolish property as a form of exploitation of man over man.

How, according to Marx and Engels, should the proletariat, as a social class act? It must, in any way, overthrow the bourgeois order and abolish the ownership of the means of production. Without a difference in ownership, there would no longer be classes, and thus all forms of antagonism in human society would disappear. Doing so, the proletariat would also overthrow the system of prejudices that the ruling class uses to ideologically disables revolution. Bourgeois morality, education, family, religion, property have to disappear. All these values apply only to the ruling class. The proletariat, as a mere tool in the hands of a capitalist is deprived of all these "apparent" values. He has no family, no religion, no education, no nation, no origin. He has only one value, usability.⁸

⁸ "The proletarian is without property; his relation to his wife and children has no longer anything in common with the bourgeois family relations; modern industry labour, modern subjection to capital, the same in England as in France, in America as in Germany, has stripped him of every trace of national character. Law, morality, religion, are to him so many bourgeois prejudices, behind which lurk in ambush just as many bourgeois interests." Marx, K., Engels, F., (1947). *op. cit.*, p. 43

So the first goal of the proletariat is to come to power. As the ruling class, the proletariat will use the state institutions to seize the capital from the capitalists, and concentrate it in the hands of the state “to increase the total productive forces as rapidly as possible.”⁹ In order to change the mode of production, the proletariat, as a ruling class, would resort to certain measures which, although unjustifiable from the point of view of the capitalist economy, would produce positive results. In a communist society, capital would thus become dependent and impersonal, and an active individual independent and personal. Eventually, all forms of the state coercion would disappear, and the proletariat would abolish itself as the ruling class.

After presenting the basic principles of the Marxist theory of society, we will analyze to which extent they have the qualities of a true scientific theory and try to determine the limits of their correctness and possible verification.

A critique of the scientific postulates of the Marxist theory of society

At the outset, the attention should be drawn to the existence of a teleological, practically metaphysical framework, of the Marxist theory of society. That framework is contained in the thesis that the substantial bearer of the social development is a conflict of classes. With great certainty, the inspiration for this view could be found in Hegel’s idea of a dialectical development through the struggle of opposites, especially in the idea of the development of freedom, as it is given in his “Philosophy of History”.¹⁰

Acceptance of such a thesis necessarily leads to a generalization. The society is seen as a carrier of development, and the individual only as a member of a particular social class. In this way, people are not differentiated as persons, but as members of a type of a class to which they belong - “a plebeian”, “a nobleman”, “a capitalist”, etc. These types of classes function as independent entities, influenced by the single developmental principle. It is a form of economic production.

A form of economic production is a tool by which the property of a subordinate class is enlarged to the extent that it eventually suppresses the property of the ruling class and establishes the form of the state that will enable it, now as a ruling class, to develop its type of property to the fullest extent possible. This new form of economic production creates a new “type” of a subordinate class, which will rule on the next stage of historical development by more perfect

⁹ Ibid., p. 52.

¹⁰ Hegel, G. V. F., (1951). *Filozofija povijesti*, Zagreb, Kultura, p. 36.

form of a production. Thus the bourgeoisie formed a class “type” of proletariat from the mass of classes which belonged to the old state order which it overcame, and it itself was formed by the “type” of the feudal lord, that established the basis for the bourgeois economic production and property.¹¹

Thus, in all social forms, the subordinate class, by its own, new form of economic production, exceeded the form of production of the old ruling class, and imposed the kind of property that suited it (by abolishing hereditary benefits, by introduction a free competition, etc.). However, what distinguishes capitalism is the highest possible form of property functioning. The property, embodied in capital, has its own developmental force, which constantly expands it, preventing any other form of property to overcome it. A proletarian is reduced to a mere “tool,” a mere addition to the machine, a mean of production, over whom all power is held by a capitalist. Apparently this is the best possible form of property functioning. The property is magnified by itself.

However, this is the only form of the property where the ruling class shares with the subordinate class to keep it alive, and where, simultaneously, the ownership becomes an obstacle to production. The solution lies in the abolition of personal property as a form of government of one class over another, and in establishing the social property in which the human’s personality could freely be developed.¹²

This is, therefore, one general principle which, with certainty, explains the development of the human society as a whole. Now, there is a question where this principle comes from?

Marx and Engels considered it to be a scientific principle in the true sense of the word, similar to Darwin’s theory of evolution that emerged at that time too. However, such a principle requires a different foundation for its proof if it wants to be able to confirm its pretensions. Not an inductive proof in a way of a hypothesis (such as Darwin’s theory) but the proof in a way of an absolute truth. It should be the principle by which science (as an fallible attempt of reaching the evidence) would end, and the path of unmistakable conclusion (like in mathematics) should follow. Only in this case the conclusions from

¹¹ “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, K., Engels, F., op. cit., p. 36.

¹² “When, in the course of development, class distinctions have disappeared, and all production has been concentrated in the hands of a vast association of the whole nation, the public power will lose its political character... In place of the old bourgeois society, with its classes and class antagonisms, we shall have an association, in which the free development of each is the condition for the free development of all.” Marx, K., Engels, F., (1947). op. cit., pp. 53-54.

that principle as “abolition of private property”, “classless society”, etc., can be considered necessarily correct. The question must be asked now - is it possible through science, as a set of hypotheses, which obtain its evidence only by confirmation of reality, to reach an absolute, unalterable truth?¹³

If we were going to form our opinion on the base of the hypothetical proofs of the scientific theories, we should be obliged to keep our views in the domain of the hypothetical truth solely. These are not pretensions of Marx and Engels Social theory. They consider their theory to be absolutely correct. The principle of the social development through a class conflict is something they claim to be an irrefutable truth.

However, the question of the methodological correctness of the conclusions being made arises. Some important arguments for supporting their theory, are based on the researches made at their own time. They assume the existence of a pre-class society on the base of the theories of George Ludwig Maurer¹⁴ and Luis Henry Morgan.

They absolutize these theories in the sense of the immutable truth, thus giving science prerogatives that it could not have. Every, even the best scientific reasoning, always remains a hypothesis. The highest level reached. Science is constantly advancing. It is not contradictory to assume that the theories of Maurer and Morgan could be overcome by some future research. But if you base your theory on potentially debatable arguments, you greatly question its claim to be an absolute truth. And Marx and Engels had such pretensions. By absolutizing the scientific achievements of their time, they wanted to put an indisputable foundations of their own theoretical perspectives. By summing up the scientific truths of the time, they want to give a general framework to their own theory, which would then function not only as scientific, but also as the only and necessary truth on which the science itself must be based.

Indicating the standpoint of the “absolutization” of scientific development, there is another objection to be made. It refers to the abolition of the possibility of any objection to one’s own theoretical position by discrediting others’ opinions and perspectives as consequences of “class prejudice.”¹⁵ Any

¹³ An interesting answer to this question is given by Paul Feyerabend in his book *Against Method*. See Feyerabend, P., (1984). *Protiv metode*, Sarajevo, Veselin Masleša.

¹⁴ Tomonaga, T., (2016). A turning point in Marx’s theory in pre-capitalist societies, *Hitotsubashi Journal of Social Studies* 47 (1), pp. 1-10.

¹⁵ Even if we put aside the problem of scientific objectivity, there are quite serious consequences concerning of functioning of personal moral values and duties if we adopt such standpoint. One of the main problems of marxism was its relation to moral. See Kangrga, M., (1983). *Etika ili revolucija*, Beograd, Nolit; Stojanović, S., (1979). *U potrazi za revolucionarnim etosom*, Filozofske studije XI, Beograd, Filozofsko društvo; Frichand, M. (1966). *Etička misao mladog Marksa*, Beograd, Nolit.

theory claiming to be scientific, and at the same time pretending to represent an absolute truth, in fact it is a dogma, and it could possess only the conditional acceptability that lies in the domain of belief.

This would be one form of thinking that is much closer to religious than scientific. This would be a form of ideological thinking that could be distinguished from religious by its manipulative use of the form of scientific proof for deceptive confirmation of its own beliefs. In this type of thought, the confirmation is actually redundant, because in the realm of absolute truth any contrary stance is a priori excluded. For these reasons, the sociological theory of Marx and Engels, because of the pretensions of absolute truth, in the true scientific sense of the word, must be methodologically incorrect.

Conclusion

In the Conclusion, we can summarize: If we took the Marxist theory of society as an ideological text, whose basic aim is to influence human belief, the only objection we could make would be a general objection to such a kind of thinking: It misuses science as a mean for fulfilling its own goals, by giving it those prerogatives it does not either have, or can ever have. There is therefore a duality on which the theory of society of Marx and Engels is split.

If we took it as a scientific theory, we would be obliged to reduce its claim of absolute truthfulness only to a hypothesis. In that case, because most of the facts that it predicted did not happen (the collapse of the capitalist order, the general rebellion of the proletariat etc.), and some predictions proved to be wrong (instead of “pauperization”, the transition of proletarians to the middle class, the failure of the socialist economy etc.), we might consider it mostly faulty. If we, on the other hand, took it as an ideological standpoint, it would have its value, but that value would be retained only in the domain of belief, where it would be left to anyone to adopt or reject at will.

In this sense, the criterion for determining the scientific value of the Marxist theory of society, due to its excessive and unscientific aspirations, could not in any way be found within it. At best, we could accept it as “one of” possible ways of interpreting the social reality theoretically, and measure its relative success according to the realization of its predictions.

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O VREDNOSTI JEDNE SOCIOLOŠKE TEORIJE

REZIME: Osnovna ideja ovog rada sastoji se u analizi osnovnih postavki i granica važenja marksističke sociološke teorije. Uvod rada bavi se pitanjem funkcionisanja društvenih nauka i mogućnosti uspostavljanja naučne teorije, koja bi, specifično u društvenim naukama, imala mogućnost uspostavljanja kriterijuma opšteg i nužnog važenja i mogla da posluži kao neosporna kritika drugih naučnih teorija. U tom smislu ukazuje se na opasnost, kada vrednosni stavovi naučnika vrše direktan uticaj na stvaranje njegovih naučnih teorija. U drugom delu rada izlažu se osnovni principi marksističke teorije društva, objašnjava se ideja klasne borbe, buržoaskog ekonomskog poretka i kapitalističkog oblika svojine, kao i pitanje nastanka i funkcionisanja proletarijata i istorijske nužnosti uspostavljanja besklasnog poretka. Treći deo rada bavi se kritikom teorijskih pretpostavki marksističke sociologije sa stanovišta njene naučne validnosti. Posebna pažnje posvećuje se načinu funkcionisanja njenih osnovnih pojmova i problemu naučnog zasnivanja opštih i nužnih činjenica u društvenim naukama. U zaključku rada ukazuje se na suštinsku razliku između nauke i ideologije i potrebu uspostavljanja kriterijuma prepoznavanja naučnih činjenica.

Ključne reči: naučna teorija, marksizam, klasna borba, hipoteze, ideologija

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