

A Review of Marx's Writings on Estranged Labor and Insights from Amartya Sen

Kevin Ross D. Nera
Ateneo De Manila University
Quezon City, Philippines



ONE OF THE WAYS IN WHICH MARX can be interpreted within the Development Field is that he was one of the last great optimists or believers in the dream that mankind could change its present course for the better. What would probably set Marx apart from other thinkers is his special concern on the manner by which man's material conditions profoundly affected man's individual and social life. This prompts him to begin his work with a scientific attempt at describing the world based on empirical facts with the overarching goal of changing the world for the better. In the *Economic and Philosophical Manuscripts of 1844*, his concern is precisely to show the status of man within the "Capitalist" mode of production (political economy) which can be read as follows:



We have shown that the worker sinks to the level of a commodity and becomes indeed the most wretched of commodities; that the wretchedness of the worker is in inverse proportion to the power and magnitude of his production; that the necessary result of competition is the accumulation of capital in a few hands, and thus the restoration of monopoly in a more terrible form...¹

Following his itinerary, Marx begins by stating that the problem with the political economy of his day is that it is driven by an assumption concerning the origin of private property and the relationships that ensue from it.² Contra traditional political economy, Marx begins with an actual economic fact, labor, and from this follows his misgivings about the status of man, his whole estrangement within the Capitalist mode of production - the money system.³

The section entitled *Estranged Labor* seems to underscore the question *How are we to understand estrangement or alienation of man within the Capitalist Production System?* This preparatory analysis by the early Marx, which calls to mind the origins of private property and its precedent effects, paves the way for his eventual prescription of abolishing private property as a solution for all the problems that are caused by this particular mode of production.

Four Estrangements

In the text, Marx takes note of four modes of Estrangements outlined in such a way that the succeeding one is deduced from the previous. These four are as follows: the alienation of man from the object of his labor, the alienation of labor as an activity, the alienation of man from his species-being (humanity), and the alienation of man from his fellow man.

¹Karl Marx, "Estranged Labor," in *The Economic and Philosophical Manuscripts of 1844 and the Communist Manifesto*, trans. Martin Milligan (New York: Prometheus Books, 1988), 28.

² Ibid.

³ Ibid.

Alienation of Man from the Object of his Labor

The relationship between man and his labor can be properly explicated by emphasizing free relationship between man and nature, the sensuous external world. Nature as the means of life for man is understood in two senses. It may consist of the objects on which man is to operate on (what he can appropriate for himself) but it is at the same time the means of life in the more literal sense of means of subsistence.⁴ Labor is thus seen as the bridge between man and nature where man appropriates nature – i.e., leaves a human imprint, humanizes nature. When man's labor finds itself actualized in a finished product, a commodity (object) is produced – the objectification of labor.⁵ This finished product stands not only as an external existence to the laborer but also as something which is alien to and standing opposed to him.⁶ The finished product of labor does not belong to the laborer. This results in alienation because it deprives the laborer of the objects labored on and which belong to him and lessens the available means for his subsistence. Thus, when the object of labor is set apart and against the labourer, the readily available means of life becomes deprived from the labourer who must now work in order to attain his means of subsistence. Instead of a free relationship between man and the world, man exists solely as a worker that produces commodities that do not belong to him. Second, he attains his means of survival precisely by attaining his means of subsistence (wage) in exchange for his labor. Thus,

This enables him to exist, first as a worker; and second, as a physical subject. The height of this servitude is that it is only as a worker that he can maintain himself as a *physical subject* and that it is only as a *physical subject* that he is a worker.⁷

This bonded relationship of worker to his product is the relationship of labor with its product (commodity). And the relationship is an inverse proportion between the quality of the

⁴ Ibid., 29.

⁵ Ibid.

⁶ Ibid.

⁷ Ibid.

worker and the quality of the object it produces. Marx attests to this by saying that:

... the more the worker produces, the less he has to consume; the more values he creates, the more valueless, the more unworthy he becomes; the better formed his product, the more deformed becomes the worker; the more civilized his object, the more barbarous becomes the worker; the more powerful labor becomes, the more powerless becomes the worker; the more ingenious labor becomes, the less ingenious becomes the worker and the more he becomes nature's servant.⁸

It is true that labor produces for the rich wonderful things – but for the worker it produces privation. It produces palaces – but for the worker, a hovel. It produces beauty – but for the worker, a deformity. It replaces labor by machines, but it throws one section of the workers back into alienating types of labor while other sections are run by machine. It produces intelligence – but for the worker, stupidity, cretinism.⁹

Alienation of Labor as an Activity

If man is alienated from the object of his labor, it is because the object is merely the summary of the activity of production which is itself 'active alienation, the alienation of activity, the activity of alienation.'¹⁰ Labor as an activity is considered as coerced, forced labor – the satisfaction not of the creative need of self-expression and production free from the need to survive but is seen as 'a means to satisfy needs external to it.'¹¹ Because it is coerced, it is shunned like the plague in the absence of any and all coercion. In forced labor, man

does not affirm himself but denies himself, does not feel content but unhappy, does not develop freely his physical and mental energy but mortifies his body and ruins his mind. ... He feels at

⁸ Ibid., 29-30.

⁹ Ibid., 30

¹⁰ Ibid.

¹¹ Ibid.

home when he is not working, and when is working he does not feel at home.¹²

All of this results from the fact that his labor does not belong to him but is actually opposed to him. Thus reducing himself to being free only in fulfilling his animal functions – eating, drinking, procreating.

Alienation from his Species-Being (Humanity)

The distinguishing mark of man is that he is conscious of his life activity and the extent of his life activity covers all of nature – his inorganic body – in which he belongs. When free, his life-activity, labor, is done free from the compulsion of having to work to survive and is the appropriation, that is, humanization, of the world where man creates in ‘accordance with the laws of beauty.’¹³ But because he is alienated from the object of his labor, he is alienated from nature itself. Because his work is itself also alienating, he labors merely in order to satisfy needs external to him – acquiring the means of survival. Thus, as a species, man is alienated from being human because he, as a human being, is alienated from the very world in which he is a part of. Second, his universal characteristic – consciousness of his own life-activity – reverses the free relationship of man to his work and now his work is done solely for the sake of assuring his physical subsistence. Marx says that:

Estranged labor reverses the relationship, so that it is just because man is a conscious being that he makes his life activity, his essential being, a mere means to his existence. Life itself appears only as a means of life.¹⁴

This takes place on the level of the individual worker, abstracted and far separated from the ideal human life. The individual, instead of appropriating the world in a free manner, making the world and himself better for it, transforms his capacity to appropriate nature – his species-being- solely as a

¹² Ibid.

¹³ Ibid., 32.

¹⁴ Ibid., 31.

means for survival – devoid of beauty and his spiritual aspect.¹⁵ Thus, as Marx says

... estranged labor tears from him his species-life, his real objectivity as a member of the species and transforms his advantage over animals into the disadvantage that his inorganic body, nature, is taken from him.¹⁶

Alienation of Man from his Fellow Man

Because man is alienated from his species, he as an individual is alienated from his fellow man. This proposition goes further as to claim that man's species-nature is estranged from him which means that one man is estranged from the other, as each of them is from man's essential nature.¹⁷ Thus, not only is man estranged from his fellow man, but all men are estranged from this sense of humanity. In the capitalist mode of production, alienation persists whether one is aware of it or not. When we say something is alien to us, it means that it does not belong to me but to another person. In the case of the finished product of labor, the commodity belongs to the one owning the means of production (capital). The capitalist thus stands in opposition to the laborer who does not own but is merely compelled to use the means of production to produce more commodities. Thus, we have the relationship of alienation prevailing between the capitalist and the worker. However, alienation is not only limited to the class of workers but extends to capitalists themselves. Capitalists must abide by the wheels of political economy – greed and competition – the war amongst the greedy – to remain capitalists.¹⁸ The commandment of "Compete or Die" is not true solely in the capture of market shares but is itself the condition of possibility of being a capitalist. Without ascribing to the set of values that are being prescribed by the capitalist system, one falls at the receiving end of the stick, which often translates to poverty.

The solution to alienation goes beyond merely better compensation for laborers. As Marx himself puts it,

¹⁵ Ibid., 32

¹⁶ Ibid.

¹⁷ Ibid.

¹⁸ Ibid., 28.

An enforced increase of wages would therefore be nothing but better payment for the slave, and would not win either for the worker or for labor their human status and dignity. Indeed, even the equality of wages, as demanded by Proudhon, only transforms that relationship of the present-day worker to his labor into the relationship of all men to labor. Society is then conceived as an abstract capitalist.¹⁹

Alternative Solutions to Alienation in the Capitalist Mode of Production

While I agree with the fundamental criticisms that Marx waged against the capitalist production system, I disagree with his proposed solution of the abolition of private property as I do not think that doing so will lead to the termination of alienation. However, with the lack of viable alternatives to Capitalism, solutions for the problem of alienation are still found wanting and while there are some efforts by authors such as E.F. Schumacher and Asuncion van Arendonk-Marquez²⁰ to address such problems by proposing alternative frameworks of development, such efforts are rarely heard or given serious attention. As such, the more mainstream efforts at reforming capitalism are given more priority such as the efforts to reform the system from within. This can be seen in Jeffrey Sachs's proposed solution for the ills of capitalist America which calls for a mixed economy and for a renewed mindfulness on the part of private citizens towards engaging society and fulfilling their civic duties.²¹ For my part, I would like to propose an alternative conception and solution for alienation that is derived mainly from the work of Amartya Sen and his ground-breaking book, *Development as Freedom*.

¹⁹ Ibid., 34.

²⁰ See Ernst Friedrich Schumacher, *Small is Beautiful: A Study of Economics as if people mattered* (London: Harrow, 1975) and Asuncion van Arendonk-Marquez, "Toward Love and Authenticity in Third World Development: A Sociological Critique of Development Models" (PhD diss., St. John's University, New York, 1985).

²¹ See Jeffrey Sachs, *The Price of Civilization: Reawakening American Virtue and Prosperity*. (Random House: New York, 2011).

Amartya Sen and Development as Freedom

In his book, *Development as Freedom*, Amartya Sen assesses and addresses the problem of alienation not through a traditional criticism of the capitalist mode of production or a description of its internal contradictions that many believe will lead to a kind of prescription. Rather, as the book's title suggests, he approaches the problem of alienation or unfreedom through the process of development. Development for him essentially has to deal not with economic growth but with freedom, that is, the liberation of people belonging to rich and poor countries alike from suffering substantial unfreedoms. Development, as he argues, is the "process of expanding real freedoms that people enjoy."²² It is essentially the same as the history of overcoming such unfreedoms.²³ And in fact, "the removal of [these] substantial unfreedoms ... is *constitutive* of development." These substantive unfreedoms include but are not limited to

Unfulfilled] elementary needs, occurrence of famines and widespread hunger, violation of elementary political freedoms as well as of basic liberties, extensive neglect of the interests and agency of women, and worsening threats to our environment and to the sustainability of our economic and social lives.²⁴ Poverty as well as tyranny, poor economic opportunities as well as systematic social deprivation, neglect of public facilities as well as intolerance or overactivity of repressive states.²⁵

The focus of his approach, he argues, is the reorientation of the proper ends and means that people should attempt to address in the work of development, that is, people's freedoms instead of merely focusing efforts on low income for example.²⁶

In his book, Sen argues for the capability perspective which focuses on people's individual freedom to live the mode of existence they value and have reason to value.²⁷ He does this

²² Amartya Sen, *Development as Freedom* (New York: Alfred A. Knopf, 2000), 3.

²³ *Ibid.*, 33.

²⁴ *Ibid.*, Xi.

²⁵ *Ibid.*, 3.

²⁶ *Ibid.*

²⁷ *Ibid.*, 18.

because of two important reasons. These are *evaluation* and *effectiveness*.²⁸ The former suggests that the expansion of substantive freedoms is the measuring stick that development interventions should look out for and not merely lowness of income or other (quantitative) indicators. The latter implies the interrelationships between individual freedom and the existing social structures in any society which may or may not conduce to the betterment of a person's chances to expand their freedoms. As such, the focus of his perspective lies with the agent or more specifically, the individual's agency. This individual agency, however, is always qualified by the existing socio-political-economic arrangements which the individual is subject to. This in turn affects how effectively he or she addresses the deprivations that affect herself and her country, whether they be rich or poor.²⁹ Thus, in order to combat the problems of unfreedom, the individual's freedom cannot be divorced from the fact of its being a social commitment.³⁰ In line with what has been said, the capability perspective focuses not on what the individual can or actually have but is rather concerned with the state of being that one can achieve. Instead of *having*, its concern is with *becoming* and the emphasis lies on the process of *becoming* that development should open up. For Sen, if development is the process of expanding the real freedoms that people enjoy, then it consists of the removal of the major unfreedoms that prohibit people from exercising their reasoned agency.³¹ The inability to employ reasoned agency – either through lack of opportunities or the absence of sufficient processes³² – thus constitutes the major form of unfreedom that Sen seeks to address. If poverty is thus seen as severe capability deprivation, it is because it prevents people from exercising their reasoned agency to achieve alternative lifestyles – lifestyles which, if people could choose to do so, would rationally be pursued by them. Poverty thus is the deprivation to live the way one wants to live. This is the same as saying as it is the deprivation of the capability to actualize the good life as one sees it. Being thus estranged from

²⁸ Ibid., 4.

²⁹ Ibid., Xi-Xii.

³⁰ Ibid., Xii.

³¹ Ibid., Xii.

³² Ibid., 17.

the good life that one seeks to have for oneself and possibly others, poverty thus becomes an extreme form of alienation.

Proposing a Way Out

If Poverty and the subsequent unfreedoms that result from it constitute alienation, what then does the solution of Development as Freedom suggest? For one, its basic approach focuses on the complementarity between individual freedom and social arrangements, where individual freedom is seen as a social commitment to overcome the major unfreedoms that we all face.³³ With the underlying theme of “expansion of freedom as the primary end and as the principal means of development,”³⁴ Sen argues for the empirical and causal relationships between social arrangements that conduce to the promotion of individual freedom. As such, the emphasis of Sen’s solution lies with the effectiveness reason for advocating the freedom perspective which focuses on the causal and empirical interconnections of certain instrumental freedoms which include (1) economic opportunities, (2) political freedoms, (3) social facilities, (4) transparency guarantees, and (5) protective security.³⁵ For him, agency of one type, which is afforded by these instrumental freedoms, strengthens agency of another type and improves the individual’s overall agency.³⁶ He argues that the existence of social institutions that are properly set in place as well as the exercise of people’s freedoms with regard to these institutions provide the enabling conditions for people’s achievement of development.³⁷ His approach focuses on individuals as agents of active change and not passive recipients of dispensed benefits.³⁸

Contra Marx who is not a fan of capitalism and its emphasis on markets, Sen views two institutions as necessary for the expansion of freedom – the free market and democracy. He argues for the case of the market and democracy in two ways.

³³ *Ibid.*, Xii.

³⁴ *Ibid.*

³⁵ *Ibid.*

³⁶ *Ibid.*, 4.

³⁷ *Ibid.*, 5.

³⁸ *Ibid.*, Xiii.

From the view of freedom as being the foundational element of development, democracy and markets provide for two elementary freedoms that people ought to have. For the former, this entails the “liberty of political participation.”³⁹ For the latter, it is the “freedom of exchange and transaction.”⁴⁰ Whereas contemporary (political) economists would argue solely for the effectiveness of both markets and democracies in attaining favourable societal outcomes, Sen illuminates the way for a more foundational understanding that is absolutely prior to, and more importantly, the culmination outcomes that such institutions bring about. This means that markets and democracies are important first and foremost because they allow for the exercise of certain substantive freedoms rather than because they produce greater wealth or social stability. While the two latter outcomes are indeed important, they are not seen as primarily ends in themselves but are always seen in light of how they affect the freedom of individuals to exercise their reasoned agency in living lives they value and have reason to value. As such, Sen’s approach to development works within the Capitalist mode of production but seeks to make it more humane. He brings back the moral element to political economy by emphasizing how social institutions should be set in place that enable people to achieve their desired functionings or actual states of being, instead of merely concentrating on what individuals can have. Becoming takes precedence over having and having is always seen in light of the desired becoming of the rational agent.

Points of Reconciliation between Marx and Sen

While there is a fundamental contrast between Marx and Sen with regards to their stand on the capitalist mode of production (the former being clearly against it while the latter seeking to humanize it), the approach of development as freedom can tend to make labor as something that is less alienating than it would ordinarily be within the capitalist framework. Sen, in his criticism of unemployment, says that unemployment is itself a

³⁹ Ibid., 5.

⁴⁰ Ibid., 6.

form of substantive unfreedom that deprives a person the capability of exercising his creative faculties. Therefore, the capacity for creative self-expression or work is seen in itself as a substantive freedom that ought to be preserved and expanded. In the framework of Development as Freedom, labor is seen not merely as a means toward accumulating more income but is part and parcel of the freedoms that allow one to lead the life that one has reason to value. Work is itself the expression of one's creative freedom that must be guaranteed by the provision of institutional arrangements that are conducive to the creation of humane jobs. This entails the creation of a working environment that is the becoming of the dignity of the human person that labors in the said environment.

As such, while there is indeed a decisive break between Marx and Sen's definition of alienation/unfreedom and their proposed solutions to it, Sen's work can be seen as a continuation of Marx's criticism and prescription for the capitalist mode of production in order that it may conduce to a better state of affairs for the people who are living within it. The re-orientation of perspective that begins with people's material condition towards the mode of being that they can have is of utmost importance and is the underlying thread that connects the two disparate thinkers. It is with great hope that whether it be through the institution of an alternative mode of economic production or through the humanization of capitalism, more people will be enabled to live the lives that they value and have reason to value instead of living lives which they feel do not belong to themselves.



Works Cited

- Marx, Karl. "Estranged Labor. In *The Economic and Philosophical Manuscripts of 1844 and the Communist Manifesto*. Translated by Martin Milligan, 28-35. New York: Prometheus Books, 1988. Marxists.
- Schumacher, Ernst Friedrich. *Small is Beautiful: A Study of Economics as if people mattered*. London: Harrow, 1975.
- Sen, Amartya. *Development as Freedom*. New York: Alfred A. Knopf, 2000.
- Van Arendonk-Marquez, Asuncion. "Toward Love and Authenticity in Third World Development: A Sociological Critique of Development Models." PhD diss., St. John's University, New York, 1985.