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# **Robert Owen, Utopian Socialism and Social Transformation<sup>1</sup>**

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## **Abstract**

This paper critically scrutinizes accounts of Robert Owen's life and works focusing on his purported 'utopianism' and his supposedly deficient 'socialism'. It suggests that such positions have relied on questionable assertions about the potential of particular modes of social transformation, and a failure to acknowledge the distinction Owen makes between the practical arrangements necessary to begin the process of transformation, and those arrangements that would ultimately prevail in 'the new moral world'. It also argues that such accounts may contribute to the development of fatalistic narratives surrounding cooperative values and projects involving strategic compromise. In response, the paper reconsiders the significance of Owen through the lens of a 'strategic presentism' that considers how Owen's ideas can be thought of as significant contributions to theorizing social transformation.

**Key Words: Utopian Socialism; Robert Owen; Social Transformation; Mutualism; Diverse Economies**

## **Introduction**

The life and works of the Welsh industrialist and philanthropist, Robert Owen, have generated a wide range of scholarship that has assigned him various labels. Marx and Engels (2002, p. 250) described him as 'utopian', a label that has become firmly established as a touchstone for discussions of Owenite thought (e.g. Goodwin, 1978; Heilbroner, 2000). Donnachie (2005, p. ix) has noted that 'hagiography generated by [Owen's] followers [...] transformed the "Social Father" of Owenism into the "Father of Socialism"', and himself describes Owen as a 'social visionary'. Elsewhere, Pūras (2014) has noted how Owen has been variously described as the founder of sociology, been relegated to sociology's pre-history, and identified as the founder of a truly scientific socialism by virtue of his use of an experimental methodology. Pūras (2014, p. 64) has suggested that these attempts to label Owen represent symbolic gestures forming part of a contemporary debate about the limits of a politically activist public sociology, and notes that 'Neither socialists, nor sociologists ever had much use for the legacy of Owenite literature'.<sup>3</sup> This represents an accurate representation of how Owen has often

been portrayed, typified for example by G. D. H. Cole's (1965, p. 7) description of Owen as a man who had a firmer grasp on the ends that he wished to achieve than the means by which he would achieve them, and Pollard's (1971, p. vii) suggestion that 'he has often been accused, and not without cause, of being a man with a single idea, and that not very original'.

This paper reconsiders Owen's significance in the history of social sciences—specifically in relation to the process of social transformation. It returns to Owen's social philosophy and his philanthropy and argues that they represent important contributions to the theory and practice of social transformation in their own right, pre-empting in many respects key features of contemporary theories of transformation. The intention is not to label Owen's life and work, or to fit it within any particular tradition that has since attempted to theorize transformation. Rather the paper aims to challenge positions that have suggested Owen's contribution to social thought has been either marginal or irrelevant. It does so by considering resonance between Owen's ideas and contemporary theories of transformation, including the critique of revolutionary practice (e.g. Wright, 2010), the so-called 'spillover thesis' of democratic participation (e.g. Pateman, 1970; Carter, 2006), and horizontalist and 'bottom-up' theories of transformation developed both by Open Marxists (e.g. Holloway, 2005; Holloway, 2010) and within the diverse economies framework of economic geography (e.g. Gibson-Graham, 1993; Gibson-Graham, 2006a; Gibson-Graham, 2006b; Gibson-Graham, 2008).

An enquiry of this kind necessarily involves a reflection on the analysis' balance between presentism and historicism in order to avoid producing a simplistic understanding that implies that the history of ideas has moved in a straightforwardly sequential, teleological, or cumulative fashion (Stocking, 1965, p. 212; Seidman, 1983, p. 80; Spoerhouse, 2008, p. 52). It is also important to guard against the development of anachronisms (Kuklick, 1999, p. 227) that may violate the availability principle and create a flawed analysis that 'ascribes statements to historical authors which answer problems which are decisive for the current state of the discipline, but which do not correspond to the repertoire of problems and the conceptual space of the past' (Spoerhouse 2008, p. 55). Recent

historiographical reflections have therefore focused on the possibility of deploying a ‘strategic presentism’, which allows ‘for the possibility that the present may be similar and/or different from the past [and] for both discontinuity and continuity in history, permitting a critical perspective on extra-historical mechanisms such as causality, linearity, or circularity’ (Fendler, 2008, p. 678). Strategic presentism effectively represents a response to the possibility that through an emphasis on historicism, and ‘by insisting on the recognition of the past’s difference from the present, we’ve made it more difficult to conceptualize why the past matters for the present’ (Coombs and Coriale, 2016, p. 87). Strategic presentism is marked out from its ‘naïve and complacent varieties’ through the development of critical perspectives that ‘might help us to better understand and address the ways the past is at work in the exigencies of the present’ (Coombs and Coriale, 2016, p. 88). In other words, a strategically presentist approach can be justified in analyses of historical approaches to questions that remain open (Stocking, 1965, p. 216; Spoerhouse, 2008, p. 56).

The life and works of Robert Owen are a particularly appropriate focus for a strategically presentist analysis. This is because one of the primary questions with which he was concerned was about how society could be transformed in a way that might ameliorate the suffering of people, as he saw it, in industrial society. This broad question is one that still resonates in contemporary theoretical discussions of social transformation, as well as numerous ongoing struggles to realize principles including equality, democracy, community, and mutuality (see Donnachie, 2011, p. 28; Siméon, 2017, p. 160). Moreover, given Owen’s explicit treatment of these questions in his life and works, an assessment of his significance with reference to (but without necessarily implying continuity with or influence on) more contemporary contributions to discussions of social transformation can be undertaken without relying excessively on interpretation of what he *may* have meant.

Strategic presentism is a normative concern; it considers the way in which the past might be thought of in order to contribute to contemporary struggles ‘to change the present’ (Coombs and Coriale, 2016, p. 88). As such, it is also necessary to reflect on what or

whom Owen's work might be relevant for (Freedgood and Sanders, 2016, p. 118). This paper argues that a strategic presentist approach considering Owen's significance in terms of contemporary theories of social transformation is particularly appropriate in light of the ongoing struggles for the values of community and mutuality, and in light of Owen's well-known influence on these movements. This is because discussions of Owen in terms of the commonly applied concepts of 'utopia' and 'socialism', which emphasize apparently intrinsic problems with Owen's project, potentially contribute to fatalistic narratives about cooperative values and projects of social transformation involving strategic compromise. This, in turn, may have a performative effect that serves to undermine contemporary struggles. In relation to utopia, this possibility stems from the notion that Owen's cooperative schemes were utopian in the sense of being inherently unrealizable. In relation to deficiencies of Owen's 'socialism', this possibility stems from the implication that there is an *ideal* form of socialism that, in turn, contributes to fostering a binary understanding of social relations in which ideal forms of socialism and capitalism are juxtaposed. As Gibson-Graham (1993, p. 10) has suggested, such narratives significantly over-simplify the complexity and diversity that characterizes human social practice, diverting attention from 'lived project[s] of socialist construction'. Moreover, by focusing on the weaknesses of transformative movements in relation to the system of capitalism to which they are supposedly in opposition, they cultivate an impression of cooperative practices as marginal, compromised by capital at the point of constitution, and destined to fail (see Gibson-Graham, 2008). In North's (2014, p. 248) terms, analyses of this kind emphasize the *limits* rather than the *conditions* of possibility for the realization of cooperative values, which may serve to undermine rather than support ongoing struggles of a similar kind. Through the adoption of a strategically presentist approach focusing on Owen's contribution to the theorization of social transformation, and in particular the significance of strategic action that may involve compromise, it is possible to think about Owen's contribution in a way that explores the conditions of possibility for social change, and do so in a way that is in keeping with Owen's own view of 'himself as an explorer and experimenter' (Siméon, 2017, p. 104).

Section one addresses Owen's purported utopianism and the extent to which Owen's designation as a 'utopian' presupposes the lack of viability of cooperative organization based on mutual values. More specifically, it argues that Marx and Engels' criticism of Owen for his eschewal of revolutionary practice is problematic, and that Owen's texts and his practice effectively represent a prescient critique of violent revolutionary transformation that is perceptive in its understanding of the complex processes involved in social transformation. Section two addresses Owen's supposedly deficient socialism. It demonstrates how discussion of these deficiencies in existing literature may contribute to the development of a fatalistic narrative surrounding the viability of cooperative values based on strategic compromise. It is divided into two parts. The first addresses the issue of education and socialization in communal experiments and the second addresses the issue of markets and property. It suggests that critical approaches to both areas tend to imply that approaches to social transformation based on strategic compromise are fatally flawed at the point of constitution. It also suggests that they fail to acknowledge Owen's recognition that *attempts* to establish alternative forms of social and economic organization are significant independently of their outcomes, on the grounds that no social change is possible without concerted strategic action. The conclusions summarize the argument, and offer brief reflection on the significance of Owen's life and work, and historiographical approaches to it, in light of some live debates about social transformation.

### **Robert Owen's Utopianism**

As Goodwin (1978, p. 2) has noted, 'utopia' is a pun that 'dwells equally on "no place" and "good place"', and utopian thinking can be identified with reference to a number of key characteristics. She suggests that these include development of 'a *model of an ideal society* located in the past (mythical or real), present (but situated elsewhere) or future', for which the thinker has 'a *serious preference* [...] based on a *concept of the Good Life*, which features an explicit central ideal' (Goodwin, 1978, p. 4, original emphasis). The combination of a critique of existing society with a formulation of an alternative is central to utopian thinking, but the distinction between 'fantasy-utopias' like 'the Land

of Cokaygne where larks fly ready roasted down the throats of open-mouthed peasants and there are rivers of wine and trees made of spice' (McCabe, 2010, p. 150), and 'real utopias' that are 'within human grasp' and have 'roots in the real world of contemporary society' (McCabe, 2010, p. 150) is a significant one. As Wright (2010, p. 6) notes, the notion of a 'real utopia' is one that is 'grounded in the real potentials of humanity', has 'accessible waystations', and institutional designs 'that can inform our practical tasks of navigating a world of imperfect conditions for social change'. The credence of any 'real utopia', Wright (2010, p. 20-5) suggests, can be assessed with reference to the extent to which it is desirable, viable, and achievable through the pursuit of '*consciously pursued strategies*' (Wright 2010, p. 24, original emphasis) in a given context.

For Marx and Engels (2002, p. 254), who labelled Owen a utopian in *The Communist Manifesto*,<sup>4</sup> there was little doubt that his ideas were desirable. It was their view that the utopians 'are full of the most valuable materials for the enlightenment of the working class' by virtue of the way in which 'They attack every principle of existing society'. As Leopold (2005, p. 452) has subsequently noted, Marx and Engels 'are usually relatively generous about the original utopians and comparatively critical of their successors and subsequent imitators', but are more receptive to the critical aspects of their works than its systematic aspects (Leopold, 2005, p. 454).<sup>5</sup> In particular, Marx and Engels (2002, p. 254) were critical of the utopians' intention to 'improve the condition of every member of society, even that of the most favoured', which they believed meant a rejection of 'all political, and especially revolutionary action' with the consequence that—as a result of their desire 'to attain their ends by peaceful means'—their plans would be 'necessarily doomed to failure' (Marx and Engels, 2002, p. 255). For Marx and Engels, therefore, their attribution of the label 'utopian' to Owen, while not entirely critical, nonetheless identifies a lack of viability and achievability and draws heavily on the idea of utopia as 'no place'. They readily and explicitly assert that the pursuit of change through strategic compromise is destined to fail.

It is clear that Marx and Engels were correct to identify Owen's aversion to revolutionary action, as he was explicit throughout his life and works that he opposed

any kind of action that might destabilize society. For instance, in *The First Essay of the New View of Society* (Owen, 1991 [1813-16], p. 16), Owen noted that it was his aim to ‘build up a system of happiness’ that could be realized without ‘domestic revolution—without war or bloodshed—nay without prematurely disturbing any thing which exists.’ In addition to offering reassurances about his intentions to those with vested interests in capital and the institutions of power, Owen was also active in advancing this message to members of the working classes whom Marx and Engels later identified as the key agents in a revolutionary transformation. For instance, in his *Address to the Inhabitants of New Lanark*, Owen explicitly advised that ‘Any sudden and coercive attempt which may be made to remove misery from men, will prove injurious rather than beneficial’ (Owen, 1991 [1816], p. 124), and in an article addressed to the working-classes in the *Star* and *Examiner* newspapers, asserted that ‘no rational grounds for anger exists, even against those who by the errors of the present system have been made your greatest oppressors and your most bitter enemies’ (Owen, 1991 [1819], p. 242). His scepticism about the potential for a movement for change led by the working-classes to realize meaningful changes also extended to expressing a concern about the potential for a tyranny of the majority to emerge in the event of an extension of the political franchise, to which he was opposed on the grounds that ‘in its present state, greater freedom than the constitution has heretofore admitted, would put to hazard the safety of the state’ (Owen, 1991 [1817e], p. 203).

Criticism of Owen’s rejection of revolutionary action, and the supposed impossibility of implementing his plans that stem from it, relies on two tenets. First, such accounts rely on the supposition that the proletarian revolution, and ultimately communism, will inevitably emerge from within capitalism as a result of increasing class antagonism. The position makes the strong claim that revolutionary action is the only kind of action through which social change can be facilitated, that it is inevitable, and other forms of social action are inherently futile. Second, such accounts rely on the supposition that the modern state, conceived as ‘a committee for managing the common affairs of the whole bourgeoisie’ (Marx and Engels, 2002, p. 221), responds functionally to the ‘requirements’ of capital accumulation, and that democratic processes both *are* and *must be* purely



formal. The position makes the strong claim that the state is a capitalist state and only a capitalist state, and will always act to preserve capital.

The first tenet is most clearly reflected in the views of Marxists like Rosa Luxemburg (2008 [1898], p. 47), who in her rejection of reformist approaches to social transformation argued

‘Either the socialist transformation is, as was admitted up to now, the consequence of the internal contradictions of capitalism, and with the growth of capitalism will develop its inner contradictions, resulting inevitably, at some point in its collapse [...] or the “means of adaptation” will really stop the collapse of the capitalist system and thereby enable capitalism to maintain itself by suppressing its own contradictions. In that case socialism ceases to be an historic necessity.’

However, despite the acceptance of the first tenet by those who labelled Owen a utopian who did not possess a viable and achievable vision for an alternative society, the position is founded on a contested ontological assertion. This resides not only in the claim that social relations are fundamentally characterized by struggle between classes, but that the conflict that characterizes this struggle is irreconcilable and moves history in definite and predictable ways—towards *revolutionary* change.

The position is objectionable because of its determinist implications, and has been rejected by contemporary Marxist scholars who continue to emphasize the significance of agency in relation to Marx’s conception of capital as a social relation characterized by struggle with *essentially uncertain* outcomes (e.g. Bonefeld, 1992, p. 98, Burnham, 2001, p. 104). As Holloway (1991, p. 71) has argued, any theorization of social relations in terms of struggle means ‘there is no room for determinism of any kind’ because ‘Struggle, by definition, is uncertain, open, and the categories which conceptualize it must be understood as open too.’ Any judgement about the viability or achievability of an alternative form of social and economic organization based on a conception of a revolutionary mode of transformation as an ‘historical necessity’ is therefore one reliant on the acceptance of a particular and particularly questionable ontology. As Leopold (2016, p. 129-31) has put it, while Marx and Engels admit the need for agency to

facilitate the ‘delivery’ of socialism through revolutionary action, they do not offer a satisfactory systematic account of how the design of this socialism will take place within capitalism if not through the construction of plans by agents that they designate ‘utopian’.

Owen’s practice has also been criticized on the basis of his belief that reform could be achieved within the limits of the constitutional framework provided by the state. This criticism is founded on the assumption that the state is a capitalist state for instrumentally or structurally determined reasons, and that as a result of them the state both *is* and *must be* a *capitalist state*. However, instrumental and structurally determined accounts of the capitalist state have been roundly rejected, including by ‘Open’ Marxists who have described instrumentalism and structuralism as ‘radical sounding pluralism’ and ‘untenable Marxified Parsonian structural functionalism’ (Burnham 1995, p. 95) respectively. Rather, this position views the state as a form of social relations (Holloway 1995, p. 116), or ‘a relation between people’ that appears to exist ‘in the form of something external to social relations’ (Holloway, 1995, p. 119-20). This position recognizes the way in which social relations may take different forms, and as a result, it is claimed that ‘diverse political phenomena such as the state and the economy do not exist as externally related entities but as moments of the class relation from which they are constituted’ (Burnham, 1995, p. 96). From this point of view, the state is a *capitalist* state only in-so-far-as the social relations that constitute it and give rise to its form are understood to have a predominantly capitalist character.<sup>6</sup> These positions therefore accept that the state is a capitalist state because social relations are understood to have a capitalist character (Bonefeld, 1992, p. 113; Burnham, 1995, p. 93; Holloway, 1995, p. 121), but they deny it possesses a functionalist logic on the grounds that social relations, ‘relations between people, are fluid, unpredictable, unstable’ (Holloway, 1995, p. 119), and therefore fundamentally open to change.<sup>7</sup> As a form of the social relations that presuppose it (Clarke, 1988, p. 127), this tradition views the state in terms of the contradictions between both capital and labour, and the global character of accumulation and the national character of political authority. The reproduction of capitalist social relations is therefore contingent on the success of strategies that ‘attempt

to confine the aspirations of the working class within the constitutional limits of the liberal state form' (Clarke, 1988, p. 133) rather than purely functional responses to the economic imperatives of capital accumulation.

It is clear, of course, that Owen's position on the state cannot be categorized in this tradition, and to attempt to do so would represent a concession to a crude form of presentism. Indeed, Owen's view that the aim of government was to 'make the governors and governed happy' (Owen, 1991 [1813-16], p. 62), implies he saw in the form of state that existed in the early 19<sup>th</sup> century a benign arbiter in much the same vein as the liberal tradition of political economy. However, it is clear in light of contemporary discussions of the state that are more cognizant of complexity surrounding the state's character, that any suggestion that Owen's project be deemed utopian in the sense of being unrealizable because it does not recognize that the state *is* a capitalist state are unfounded because it is by no means certain that the state is a capitalist state in a structurally determined or functionalist way. As Wright (2010, p. 336, original emphasis) notes, 'while the state may indeed be a "capitalist state" that plays a substantial role in reproducing capitalist relations, it is not *merely* a capitalist state embodying a pure functional logic for sustaining capitalism.' On this basis, it is possible to argue that Owen's thought was significant precisely because he did not recognize the state as a capitalist state in a structurally determined or functionalist way; his thought did not leave open only revolutionary paths towards change, but also provided for the possibility of transformation facilitated by changes in the form taken by relationships between people as they are mediated in the context of specific struggles. By conceiving Owen's life and work in this way, his strategic compromise can be re-framed as a viable (if unsuccessful) strategy, and such an approach therefore avoids constructing an analysis that may contribute to undermining similar struggles of the present by avoiding the implication that they are flawed at the point of constitution, as has often been asserted in previous discussions of Owen's 'utopianism'.

So far this section has shown that criticism of Owen by the so-called 'scientific socialists' asserts that his lack of understanding of the role of revolutionary action and the

character of the state meant his proposed villages of cooperation were neither viable nor achievable. The next part of this section goes beyond this defence, and suggests that Owen's rejection of revolutionary transformation might be seen as an important contribution to theorizing social transformation in its own right. This is particularly true of the ways Owen's texts and practices recognized key limitations to revolutionary modes of transformation in two respects: first, the innate difficulties in fostering support for revolutionary movements; and second, the difficulties in sustaining such support if it is achieved.

Marx and Engels' (2002, p. 258) famous call to action deployed the rhetoric that proletarians 'have nothing to lose but their chains'. In reality, however, fostering a broad base of support for a movement aimed at affecting a wholesale transformation of social relations presents a challenge because even the most exploited people in society might feel that they have far more to lose than 'their chains'. In light of these potential losses, cognitive dissonance and adaptive preference formation have been recognized as key problems for developing support for a transformative movement. As Elster (1989) has noted, people may be reluctant to engage in transformative movements because of the difficulties they perceive in realizing their goals. Reasons for this include that fact that they may not be able to 'bring themselves to undergo the painful learning process that is required', or because they identify the existing state of affairs as representing a lower risk than attempting change (Elster, 1989, p. 138-9). Even if people might have ambitious preferences at an ideal level, he suggests that people's 'desires and aspirations might unconsciously adjust [...] to avoid cognitive dissonance' (Elster, 1989, p. 155).

Žižek (2001, p. 5) has likewise noted how experimental psychology has shown that 'formal freedom does not make any difference' to the choices that people make, and that even people with formal freedom 'tend to "rationalize" their "free" decision in a particular way. Unable to endure the so-called cognitive dissonance [...] they will tend to change their opinion about the act they were asked to accomplish' (Žižek, 2001, p. 5). Holloway (2005, p. 9) is even more explicit in his discussion of the difficulties involved

in fostering support for transformative action that stem from the potential for such action to incur personal loss:

‘It is hard to believe that anyone is so at home with the world that they do not feel revulsion at the hunger, violence and inequality that surrounds them. It is much more likely that the revulsion or dissonance is consciously or unconsciously suppressed, either in the interests of a quiet life or, much more simply, because pretending not to see or feel the horrors of the world carries direct material benefits.’

The fact that people clearly have more to lose ‘than their chains’ represents a powerful barrier to participation in a transformative movement that aims at producing a wholesale reform of social relations.

These tendencies mean that maintaining a broad range of support for a transformative movement, even if it could be fostered in the first place, would also likely prove problematic. As Wright (2010, p. 314) notes, while a ‘socialist fantasy path’ plotting the material welfare of the median person might expect to see an immediate increase following transformation, it seems more likely that material welfare of the median person would experience a ‘transition trough’, even if it did ultimately recover and exceed levels that could have been expected without a change (Wright, 2010, p. 314-5). This situation is made more complex in light of the likelihood that the different material positions of different social groups prior to a significant change in social relations would mean these ‘transition troughs’ would be experienced differently by those social groups. This raises the possibility that those experiencing deeper and more sustained declines in their material welfare following transformation would be likely to withdraw their support for the process (Wright, 2010, p. 317), and indeed, the possibility that this might occur would seem to have considerable power to encourage processes of adaptive preference formation.

It is now widely accepted, therefore, that sudden or seismic changes in social relations may discourage, rather than encourage, the development of a broad basis of support for transformative change. In his suggestion that a revolutionary movement would ‘prove

injurious rather than beneficial’ (Owen, 1991 [1816], p. 124; cf. p. 7 above) Owen effectively acknowledges this criticism of revolutionary change in terms of the potential negative impact on the material welfare of individuals involved, and Donnachie (2011, p. 15) has noted that this was precisely ‘the appeal to the elites, who felt threatened by potential disorder’. Similarly, his call for people to avoid directing their anger towards other social classes (Owen, 1991 [1819], p. 242; cf. p. 7 above) shows him to be cognizant of the fact that social change would likely require a ‘broad coalition between the middle class and the working class’ (Wright, 2010, p. 317) if it was to occur under the conditions that he advocated. By viewing Owen’s ideas in the context of such formulations, it is possible to see their value while avoiding the development of analyses that emphasize *inherent* flaws in Owen’s approach and which may serve to undermine essentially similar struggles based on strategic compromises.

### **Robert Owen’s Socialism**

Just as the Marxist designation of Owen as a ‘utopian’ has served to create an impression of his project as fundamentally unrealizable, so have criticisms of the character of the ‘socialism’ that he attempted to develop. They do so by presenting a narrative of Owen’s life and work that suggest it was inherently compromised by action anathema to the values of cooperation and mutuality at the point of constitution. This section questions this position by examining, first, criticisms of Owen’s approach to education and socialization; and, second, criticisms of Owen’s approach to markets and property ownership.

#### *Education, Socialization*

Throughout his life, Owen persistently emphasized the fact that human beings should be considered products of their social environment, and that where social problems arose, they did so because the character of individuals had been formed under conditions that had shaped their character (Owen, 1991 [1813-16]). As he phrased it in the dedication to the Fourth Essay in *A New View of Society*, ‘the true origin of [...] misery may be

traced to the ignorance of those who have formerly ruled and those whom they have governed' (Owen, 1991 [1813-16], p. 8). It was his assertion that 'the members of any community may by degrees be trained to live *without idleness, without poverty, without crime, and without punishment*' (Owen, 1991 [1813-16], p. 15, original emphasis). His belief was made resolute by his experience at New Lanark, where he claimed that his principles had been applied 'at first under many of the most discouraging circumstances, but persevered in for sixteen years, effected a complete change in the character of the village' (Owen, 1991 [1813-16], p. 33). He argued that it 'may truly be stated that they now constitute a very improved society; that their worst habits are gone, and that their minor ones will soon disappear under a continuance of the application of the same principles' (Owen, 1991 [1813-16], p. 33).

It was on the basis of this belief that Owen argued that the government should 'adopt, without delay, the proper means to form those sentiments and habits in the people' (Owen, 1991 [1813-16], p. 62) through the implementation of 'A System for the Prevention of Crime, and the Formation of Human Character', which would provide education and employment for individuals and therefore help address the moral shortcomings he believed were created by the processes of socialization that were prevalent in industrial society (Owen, 1991 [1813-16], p. 82-4). However, while Owen clearly imagined a significant role for government in catalysing the construction of these alternative kinds of institutions, the primary way in which he imagined affecting social transformation was through the creation of cooperative communities in which people would experience the benefits to be derived from mutuality first hand, with attendant improvements in the overall 'moral character of society'.

This was made particularly clear in his interventions throughout 1817, in which he repeatedly asserted that the reason his plans had not been adopted could be traced to the ignorance of governors as to the 'true' nature of social problems (e.g. Owen, 1991 [1817b], p. 165; Owen, 1991 [1817c], p. 176; Owen, 1991 [1817d], p. 189), and his attendant claims that through observation and participation, people would come to see the objective truth in his ideas. As he phrased it in his *Report to the County of Lanark*:

‘Simple inspection, when both can be seen together, will produce motives sufficiently strong to carry the new arrangements into execution as practice will admit. The change, even in those who are now the most tenacious supporters of “things as they are”, though left entirely to the influence of their own inclinations, will be so rapid, that they will wonder at themselves’. (Owen, 1991 [1820], p. 282)

It would be in the context of familiarity with the principles Owen had outlined, when put into practice, that would form the basis of a social transformation because from the experience, he argued, ‘It will be quite evident to all, that wealth of that kind which will alone be held in any estimation [...] may be so easily created to exceed all their wants, that every desire for individual accumulation will be extinguished’ (Owen, 1991 [1820], p. 298).

It has been noted that the methods of socialization and education through which Owen attempted to render visible the benefits of mutualism clearly produced some beneficial results, Heilbroner (2000, p. 17) for instance suggesting that New Lanark ‘shone like a beacon’ among the widespread squalor of the industrial revolution.<sup>8</sup> The reduction in the working day to 12 hours including meal breaks, the maintenance of employment during periods of depressed demand, and the introduction of a ‘contributory sickness and superannuation fund [...] and free medical services’ along with village schools (Harrison, 1969, p. 154-5) have also been praised in relative terms, but judgments often made that these concessions were made in the service to capital rather than a properly socialist project.

This is particularly evident in relation to discussions of workplace discipline and education at New Lanark. The former was famously managed through the operation of the so-called ‘silent monitor’—‘a four sided piece of wood, about two inches long and one broad; with the sides painted respectively, black, white, yellow and blue’ (Sargant, 2005 [1860], p. 38)—to publicly record the ‘conduct of the worker during the previous day’ (Harrison, 1969, p. 158). G. D. H. Cole (1965, p. 105) has described this as a condescending method of imposing workplace discipline, which was effectively ‘like treating the workers as children’. Donnachie (2005, p. 82) likewise argues that ‘books of



character' and the 'silent monitor' were just small parts of a much more sophisticated system of managerial control. As he puts it, 'there are other grounds for believing that Owen operated a strict regime at New Lanark', which included 'random searches of workers to reduce the thieving which had become widespread by the time of his takeover', the recording of errors made by employees, and dismissal for absenteeism (Donnachie, 2005, p. 82).

The nature of education in Owenite communities has been similarly criticized. Margaret Cole (1965, p. xiii) noted that Owen himself could be regarded as a man who would not 'think differently of a book for having read it', and it has been suggested that the pedagogies he adopted reflected his own limited vision. Donnachie (2005 p. 166) has noted how this resulted in the appointment of a teacher who was 'simple minded' and 'willing to do exactly what Owen told him', and a 'seventeen year old village girl' as his assistant. While Owen claimed to be interested in realizing happiness for the people of New Lanark, he suggests that 'by "happy" Owen meant "docile"' (Donnachie, 2005, p. 166). The processes of learning were described as 'the factory system applied to education' (Donnachie, 2005, p. 168) and his overall intention in this sphere summarized as aiming to give 'children a good basic education, fitting the village youth for the world of work in the mills, but at the same time not educating them enough to pose a threat to the existing order of society' (Donnachie, 2005, p. 170). As a result of the supposed deficiencies in processes of socialization and education, it has been noted that 'Owen resembled a feudal baron, allocating tasks, giving rewards, and dispensing justice' (Donnachie, 2005, p. 242).

Discussions of the practices at New Lanark that occur in isolation from consideration of Owen's broader social philosophy tend to emphasize not just conservatism, but also imply that the actions may have been undertaken specifically in order to enhance productivity by preparing workers for the demands of the commercial society through 'top-down' discipline and 'bottom-up' socialization. By implication they also cast doubt on the desirability of a cooperative project conceived on this basis. However, Owen's social philosophy contains a clear normative commitment to democratic governance;

‘Each village will ultimately be governed by a committee of all its own members, from forty to fifty years of age; or, should this be too numerous, it may be composed of all from forty-five to fifty years of age; which would form a permanent, experienced, local government, never opposed to, but always in close union with each individual governed’ (Owen, 1991 [1817e], p. 201). He also expressed belief in the principle of equality in his assertion that ‘NO MAN HAS A RIGHT TO REQUIRE ANOTHER MAN TO DO FOR HIM, WHAT HE WILL NOT DO FOR THAT MAN; OR, IN OTHER WORDS, ALL MEN, BY NATURE, HAVE EQUAL RIGHTS’ (Owen, 1991 [1839], p. 344, original emphasis), and he outlined a detailed governance structure for communities based on age and experience, which he believed would be acceptable on the basis that

‘everyone would know that permanent arrangements had been purposely devised and executed to ensure impartial justice to everyone by each being so placed, trained and educated from birth to maturity, that he would be, as he advanced in age, secure of experiencing all the advantages and enjoyments which the accumulated wisdom of his predecessors knew how to give to the faculties and powers which he derived from nature’. (Owen, 1991 [1839], p. 354)

These principles were later entrenched in Owen’s thought in the form of a coda of laws, published as *The Revolution of the Mind and Practice of the Human Race* (Owen, 1991 [1849], p. 372-3).

This difference between the historical experience of Owenite communities and Owen’s vision for them can helpfully be discussed in terms of the distinction between ‘transitional’ and ‘non-transitional’ communities (Leopold, 2015). In the former, the character of participants would have been formed under the conditions of the ‘old immoral world’ and would require the leadership of the ‘enlightened’, such that critical discussions of the character of authority in these communities ‘have purchase on their target’ (Leopold, 2015, p. 199). In the latter, however, where individuals had been socialized from birth into the norms of ‘the new moral world’, such singular authority would not be necessary, and communities could be governed by gerontocracy without the backing of force (Leopold, 2015, p. 204). Effectively, Owen suggests that the experience of mutuality would strengthen it by virtue of experience, which in many

respects reflects the broad idea of what has come to be known as the ‘spillover thesis’ of democratic participation (Carter, 2006). Like Owen, this position suggests that ‘individual attitudes and behavior are shaped by the institutions within which they act’, with the attendant consequence that ‘where individuals actively engage in democratic institutions they are more likely to develop the necessary attitudes, skills, and psychological qualities that contribute to individual political efficacy, which in turn will increase political participation’ (Carter, 2006, p. 411).

Despite this resonance, however, it is in the views of Jean Jacques Rousseau and John Stuart Mill that the significance of education are more commonly discussed in debates about democratic participation (e.g. Pateman, 1970; Carter, 2006). Pateman (1970, p. 24), for instance, notes how Rousseau believed that participation was educational in the sense that it would help develop responsible social action, and how Mill favored ‘popular participatory institutions’ in order to foster ‘public-spirited type character’. In discussions of Owen’s contribution to social and political thought it would seem appropriate to place a much greater emphasis on the way in which his ideas relate to those of Rousseau and Mill in light of clear overlaps, even if we do not necessarily infer influence.<sup>9</sup> In doing so, it is possible to identify value in the strategies Owen employed that might encourage rather than marginalize ongoing struggles for the values of mutuality.

It is also striking the extent to which the criticisms of Owen as authoritarian, paternalistic, and condescendingly coercive, are criticisms that could also be leveled at Rousseau, and in particular the notion that one can be ‘forced to be free’ (Rousseau, 2004 [1762], p. 19). However, while Pateman (1970, p. 25-6) rescues Rousseau from this critique with her explanation that he believed the processes by which one is ‘forced to be free’ were ‘part and parcel of the same process by which he is “forcibly” educated through decision-making’, and without which there could be no action in the general will, such positions remain central to the critique of Owen. For instance, Claeys (1992, p. 5) laments Owen’s failure ‘to see that the more formal mechanisms of democracy [...] were crucial means of avoiding tyranny in a less than perfect and less than wholly

equal world'; Tsuzuki (1992, p. 43) has described Owen's ideas about the formation of human character as 'a mistake'; and Nagai (1992, p. 68) has argued that 'the mixture or co-existence of the formative principles of society and the managerial principles of commercial societies' represents a 'Fatal theoretical error.' In assessments of the deficiencies of Owen's socialism in this regard, there is the clear suggestion that flaws were inherent, and the project destined to fail as a result of these inherent flaws. By contrast, recognizing parallels with other similar and significant contributions to the theorization of social transformation makes it possible to develop a reading of Owen that emphasizes the conditions, rather than the limits, of possibility (North, 214, p. 248; cf. p. 4-5 above) for cooperative projects and which may contribute to contemporary struggles to realize them.

### *Markets, Property*

A second area in which Robert Owen's socialism has been criticized relates to his approaches to markets and property. In particular, it has been noted that New Lanark itself was a capitalist enterprise first and foremost, even though it was a more benevolent form of capitalist enterprise than prevailed elsewhere at the time. As Claeys (1991, p. ix) notes, 'Owen had no conception of profit sharing at the mills, and no dream of eliminating competition', or as Harrison (1969, p. 155) put it, 'The whole operation could never be mistaken for anything other than what it was: a profit-making cotton mill'. Donnachie (2005, p. 157) has echoed this position, noting that in so far as New Lanark could be considered a success, this success can be attributed to 'the fact that the mills remained a well-capitalised, professionally managed, highly profitable enterprise', the most valuable resource of which was compliant labour. Moreover, in relation to New Lanark, Donnachie (2011, p. 15) notes that 'there was no mention of egalitarianism, if that was ever part of Owen's agenda'. Harrison (1969, p. 47) has also noted that Owen never adopted a consistent position on community of property and indeed asserts that Owen had never intended for such arrangements to be put in place at New Harmony, Indiana (Harrison, 1969, p. 181), and Donnachie (2005, p. 219) suggests in relation to New Harmony that Owen had 'no clear ideas if the comunitarians [sic]

were to be regarded as employees, partners or tenants of his as lord proprietor'. In the communities' failure to subvert existing class relations (G. D. H. Cole, 1969, p. 145) and the fact that they remained under the control of landowners or capitalists (G. D. H. Cole, 1969, p. 226), the possibilities of realizing socialism are seen as fundamentally limited.

These critiques accurately reflect the fact that Owen was conscious of the need to secure capital if his vision for the new moral world was to be realized, and was aware that he could not expect this support to be forthcoming on the basis of voluntary contribution alone. As a result, and as Claeys (1987, p. 42) has suggested, it was 'self-interest which was to usher in the new moral world'. This was reflected in the fact that in his attempts to foster support Owen (1991 [1813-16], p. 4) had argued that the adoption of his system could 'return you, not five, not ten, or fifteen per cent for your capital so expended, but often fifty, and in many cases a hundred per cent.' In his view, it would be the case that the new system would 'combine a greater degree of substantial comfort to individuals employed in the manufactory, and of pecuniary profit to the proprietors, than has hitherto been found attainable' (Owen, 1991 [1813-16], p. 60). The appeal to the pecuniary motives of capitalist benefactors also had knock on effects in terms of governance, with Owen (1991 [1820], p. 296) noting that where the initial capital outlay was made by 'landowners and capitalists, public companies, parishes or counties', the new communities would be under the direction of the individuals whom these powers may appoint to superintend them, and will of course be subject to the rules and regulations laid down by the founders.'

Owen also clearly introduced social distinctions in communities to be formed by associations, in which there were to be no fewer than seventeen distinct class groupings based on property ownership (Owen, 1991 [1817f], p. 208-10).<sup>10</sup> However, it is again important to note the difference between the practical application of his ideas about property and its impact on social distinctions and his normative ideas, which later rejected both: it was Owen's view that private property formed 'an inequality of rank and condition among the members of the community' representing 'demoralizing and

vicious arrangements' (Owen, 1991 [1840], p. 362). Once again, the distinction between Owen's approach to 'transitional' and 'non-transitional' communities (Leopold, 2015; cf. p. 18 above) is significant for making an assessment of Owen's beliefs about property, but which has often been overlooked in existing analysis with the effect that his approach was not considered viable because of its reliance on strategic compromises. However, while critiques of Owen's socialism that claim that the preservation of class distinctions played a role in precipitating their decline appear reasonable, when identified as fundamental strategic errors they contribute to the construction of a narrative of social change that rules out compromise or hybridization, and close off the range of ways in which transformation might be pursued. However, contemporary theories of transformation, particularly in the Open Marxist tradition and the diverse economies framework of economic geography, increasingly emphasize the significance of process over outcomes, and by discussing Owen's significance in terms of his positive attempts to transform society, it is possible to avoid contributing to narratives that appear to render certain approaches to social transformation inherently unviable and instead encourage an exploration of possibilities.

In the Open Marxist tradition, Holloway (2005, p. 213) conceives of change as a project of transforming power by taking action that 'points beyond' existing forms of social practice. Like Owen, Holloway (2005, p. 2) departs from a belief 'that the wrongs of the world are not chance injustices but part of a system that is profoundly wrong.' It is only through an active process that transformative practices acquire meaning, or as Holloway phrases it, 'Doing [...] is central to our concern not simply because doing is a material precondition for living but because our central concern is with changing the world, negating that which exists' (Holloway, 2005, p. 23). For this position, the significance of taking action to try and construct alternative forms of social relations is clear, as the transformative process is conceived of as one of 'negation-and-creation' (Holloway, 2010, p. 18). Moreover, the position takes the view that it is the act of creation itself and not the outcome that should be the focus of our attention; it is acknowledged that there is 'absolutely no guarantee of a happy ending' (Holloway, 2010,

p. 9) and that ‘We need no promise of a happy ending to justify our rejection of a world we feel to be wrong’ (Holloway, 2005, p. 2).

The importance of taking action to supplement critique is also clearly apparent in the diverse economies framework, which rejects the notion that there is anything ‘essentially capitalist’ about particular kinds of social action (Gibson-Graham, 2006a, p. 246; cf. *note* 5 above) and argues that labelling them as such has a performative effect by constructing capitalism as a ‘singular’, ‘unitary’, and ‘hegemonic’ system of organization (Gibson-Graham, 1993) that appears as if it can only be replaced by a similar systemic alternative (Gibson-Graham, 1993, p. 14). Gibson-Graham (1993, p. 11) suggests that this ‘contributes to socialist absence’ by discouraging participation in ‘projects of class transformation’ because the scale of the task it suggests is required appears too great. The position also emphasizes the significance of acts of creation as part of the process of social transformation, with Gibson-Graham’s (2003, p. 52-3) emphasis on enacting a resubjectivization of individuals so that economic relations become ‘a domain of potentiality and a space for the unfolding of creative engagements’. It likewise emphasizes the significance of the process of acting, rather than the outcome of action, as part of an ontological reframing so ‘a representation of structural impossibility can always give way to an ethical project of possibility’ (Gibson-Graham, 2008, p. 616-7). Practically, the diverse economies approach diverges from the kind of assessments of alternative social practice that may frequently be found in the critique of Owen:

‘rather than judging community economic experiments as unviable because they depend on grants, gifts, state subsidies, long staff hours, volunteer labor, unstable markets and so on, we study their strategies of survival, support their efforts to learn from their experience [...] and help them find ways of changing the world they wish to change’. (Gibson-Graham, 2008, p. 628)

These approaches have clear resonances with the philanthropic action that Owen took on the basis of his social philosophy. While critics have accurately described the circumstances contributing to the decline of Owenite communities, in doing so they arguably contribute to developing a fatalistic narrative about the values he pursued. In

light of the emergence of traditions like Open Marxism and the diverse economies framework, such critiques overlook the fact that while the systems he implemented may have involved individuals who could not properly be described as ‘Owenite’, and many of whom were either explicitly or implicitly interested in pecuniary gain, his strategic action was more likely to achieve social change than doing nothing at all: as Wright (2010, p. 299) notes: ‘social empowerment is not something that will happen just as a by-product of social action for other purposes; it requires deliberate strategic action [which] typically involves struggle.’ While the kinds of projects Owen undertook did not ultimately achieve their aims, his recognition of the necessity of strategic action, and his understanding of its significance to the process of transformation, are clear to see. By re-framing aspects of Owen’s life and works that have often been discussed as deficiencies or flaws, as strategic compromises that constitute a significant contribution to the theory and practice of social transformation, the co-operative values he pursued are also re-framed; rather than appearing to be flawed, compromised, or doomed at the point of constitution, they appear to be ripe for experimentation in projects that point beyond the problems of capitalist social relations.

## **Conclusions**

Much has been written about Robert Owen, however a great deal of this literature has focused on his purported ‘utopianism’ and his supposedly deficient ‘socialism’. This literature has often taken a critical tone, and implied that his ideas and experiments may have been intrinsically flawed and destined to fail at the point of constitution. This paper has reconsidered this position, and argued that these flaws can be interpreted as strategic compromises that show Owen’s life and work to be significant for theorizing the process of social transformation. First, it suggested that the case often made for Owen’s ‘utopianism’ can be re-framed as a recognition of key problems of revolutionary transformation, in particular those related to the theory of the state on which they are based, the difficulties of adaptive preference formation, and problems associated with the material effects of transformation. Second, it suggested that the case made against Owen’s ‘socialism’ neglects the distinction between ‘transitional’ and ‘non-transitional’



communities (Leopold, 2015). It suggested that by considering Owen in terms of resonances between his work and contemporary theories of transformation it is possible to avoid developing narratives that tend to emphasize the limits of cooperative values and strategies to realize them, and place greater emphasis on the possibilities they present, and in turn to encourage on-going struggles for these values that have often been labelled as marginal, unrealizable, and ‘utopian’.

Such on-going struggles are numerous and diverse. Space dictates that it is not possible to reflect in detail on what Owenite thought and experience might offer here, but it is clear that several significant social movements have been founded that attempt to transcend the logic of commercial market society in contemporary capitalism and resonate with the values of community and mutuality pursued by Owen. These include the Zapatista movement in Chiapas, Mexico, which has aimed to assert the autonomy of the indigenous population from the Mexican state and the consequences of integration with the global capitalist economy, especially after the North American Free Trade Agreement (see Andrews, 2010; Dinerstein, 2013); the movement for participatory budgeting in Porto Alegre, Brazil, which aimed to assert democratic control over municipal expenditure (Wright, 2010); and the resistance to global capitalism embodied in the Occupy movement. Each of these movements shares in common with Owenism the experience of being criticized as unworkable, unsustainable, or insignificant in their own right; the implication has been that they are, in the sense of ‘no-place’, utopian schemes. In order to avoid the performative effect of deploying such language in relation to alternative social and economic arrangements, it is necessary to move beyond critique of transformative schemes and consider in more definite ways how the sustainability of these movements might be enhanced, including if necessary any pragmatic compromises that might be required. It is here that there is much to be learned by reflecting on the life and works of Robert Owen, who despite his unwavering conviction in the desirability and achievability of a different kind of social world recognized that mere idealism would be insignificant without action, and was willing to experiment with pragmatic compromises that appreciated the complexity surrounding

the process of transformation in the real world in order to create the possibility of a different world.

## Endnotes

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<sup>1</sup> I am grateful to Helen McCabe and David Leopold for their comments on earlier drafts of this paper, as well as the comments of the anonymous reviewers from *Journal of the History of the Behavioral Sciences*, which have helped to improve the article.

<sup>2</sup> Chris Rogers received his PhD from the University of Warwick, UK, in 2009, before taking up a post at the University of York, UK, where he was also the recipient of a Leverhulme Early Career Fellowship. Chris returned to the University of Warwick in 2014, where he is currently Associate Professor of Political Economy and Public Policy. Chris' research interests relate to the role of the state in economic management, social-democratic politics and policy, and the potentialities of mutualism. Chris is author of *Capitalism and Its Alternatives*, published by Zed Books (London) in 2014.

<sup>3</sup> Although a comment on style as much as substance, it is worthwhile noting that in his widely read *The Worldly Philosophers*, Heilbroner (2000, p. 326) went so far as to declare in the guide to further reading that 'There is no use trying to read the Utopians'.

<sup>4</sup> However, Marx and Engels were not the first to discuss Owen in these terms. Siméon (2017, p. 119) notes that William Hazlitt had done so in 1816.

<sup>5</sup> It is worthwhile noting Jossa (2012, p. 402) has drawn attention to the fact that Marx was by no means consistent in his skepticism of a system of cooperatives as a feasible way of progressing history. He notes that Marx's 'Instructions to the Delegates' of the General Council of the International Working Men's Association 'clearly show that Marx looked upon an all-cooperatives system not only as feasible, but as bound to make headway in history, as a new mode of production that would wipe out hired labour, and as a system in which privately owned means of production—i.e., capital—would no longer be used to enslave workers.'

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<sup>6</sup> This is a perspective that is frequently taken in Open Marxist analysis, however Gibson-Graham (2006a, p. 246) have noted that it is important to appreciate the complexity and diversity that social relations take at any given time, as commodities are produced and circulated both to expand capital and enable people to secure other commodities, such that ‘there is nothing “simply capitalist” about a commodity. “The market” for commodities is a space of difference, not only multiple and heterogeneous in its practices, but lacking a dominant logic or relation of production’.

<sup>7</sup> The extent to which the ‘Open’ Marxist view of the state does in fact avoid espousing a functionalist logic for the state has, however, been subject to some debate. The nature of the debate is clearly illustrated in the contributions compiled in Bieler, Bonefeld, Burnham and Morton (2008), as well as more recent contributions by Ian Bruff (2009), Werner Bonefeld (2009), and Pinar Dönmez & Alex Sutton (2016).

<sup>8</sup> For a discussion of Owen’s impact on New Lanark it is worth considering the conditions at New Lanark that were inherited from his predecessor, David Dale. For a full discussion, see Siméon (2017, p. 24-39).

<sup>9</sup> Although as Siméon (2017, p. 71) notes, ‘Rousseau’s influence is highly unlikely, given that *Emile* explicitly opposed collective schooling.’

<sup>10</sup> In addition to the social distinctions introduced through such structures of subscription, Kamau (1992) has noted how social practices within the communities were also significant in maintaining divisions, as secular practices including public meetings became ‘symptomatic of the social divisions within the Owenite community’ (ibid, p. 80). Kamau (ibid., p. 82-3) also notes how even recreational activities surrounding parlor music—emblematic of Anglo-American bourgeois traditions—were dependent on formal instruction in music and dancing that limited participation and therefore distinguished between different orders.

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