



Utopia with Science: Methods of Robert Owen's Socialism

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This paper introduces recent Japanese debates marking the 250th anniversary of Robert Owen's birth in 2021. It identifies five key issues in Japanese research: (i) the relationship between Owen and utilitarianism; (ii) debates between Owen and William Thompson; (iii) the question of science and utopia; (iv) Owen's later ideological development; and (v) his relationship to economic and political movements. The paper focuses on Owen's socialism, which emerged alongside the rapid development of science during the Industrial Revolution, as Owen sought to connect his vision of utopia with scientific methods of calculation and deduction. The paper makes reference to the relationship between socialist ideas and utilitarian science, which was the starting point for Owen's co-operative thought. By analysing Owen's texts, we identify four key features that characterise Owenite socialism: (i) happiness-seeking utilitarianism; (ii) an emphasis on human development and the role of education (character formation theory) based on environmental determinism; (iii) criticism of individualistic institutions that hinder happiness; and (iv) scientism or empiricism.

Japanese Studies of Robert Owen on the 250th Anniversary of his Birth

In Japan, it is not uncommon to find co-operators who cite Robert Owen as their "spiritual forefather" and academics who continue to deepen our understanding of Owen. This level of interest was reflected in a series of seminars and publications to mark the 250th anniversary of Owen's birth in 2021. The Japanese Robert Owen Association held its 177th seminar on "The 250th anniversary of Robert Owen's birth: From utopia to co-operative thought", published by Gaku Sukuzi in the Annual Report of the Robert Owen Association (Japan) (2022, No. 46). A special issue of the *Journal of the Ohara Institute for Social Research* (2021, No. 754) included three articles on the theme of "Robert Owen's ideas of co-operation: A re-examination", among which was one by Goto (2021). The Consumer Co-operative Institute of Japan held a seminar on "On the Early U.K. co-operative movement and its controversies: Robert Owen's 250th anniversary and Malcolm Ludlow's 200th anniversary", which was also included in the *Report of Consumer Co-operative Institute of Japan* (2022, No. 97) with a contribution by Nakagawa (2022). The remainder of the paper provides an overview of the various issues raised in those seminars and what they can tell us about recent Japanese studies.

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Summary of Key Debates

The debates fall into the following five topics: (i) The relationship between Owen and utilitarianism. Shortly before his death, the Director of the Robert Owen Association, Naobumi Hijikata, prepared a manuscript which examined the connection between Owen's thought and the utilitarianism of Jeremy Bentham (Hijikata, 2019). (ii) Debates between Owen and William Thompson. Although Owen expressed utilitarian ideas in his early writings, it is possible that his understanding of utilitarianism deepened through his interaction with Bentham's disciple William Thompson. This did not prevent differences between the Owenites and Thompson's group which broke out at the third Co-operative Congress, when Thompson called for democratic decision-making and self-management in the co-operative movement, while Owen showed a tendency to behave as the governor of the co-operative movement. (iii) The question of science and utopia. Although part of this argument is picked up by Nakagawa (2022), the relationship between science and utopia, or science and political economy is more fully discussed by Yuki (2021a, 2022), who points to the fact that although well-established within Marxist discourse, the term Utopian Socialism is not necessarily understood or fully worked out. (iv) Owen's later ideological development. Hijikata (2003) noted that the study of Owen's later ideological outlook, especially *The book of the new moral world*, remains largely unexplored and should be a key area of focus for future research. (v) Owen's relationship to economic and political movements. Owen engaged in several debates with political economists at the time, especially with his concept of labour notes and on the gold standard. In particular, it is necessary to clarify the relationship with the Birmingham school, which was strongly opposed to the return to the gold standard after the Napoleonic war and was closely associated with the Chartist movement (Yuki, 2021b).

Yuki (2022), furthermore, focuses on Owen's socialism, which emerged with the rapid development of science during the Industrial Revolution, with attention to the discourse on the scientific nature of socialism, otherwise referred to as utopia. He also concentrates on the relationship between socialist ideas and utilitarian science, which was the starting point of Owen's co-operative thought. The following sections will address the utilitarian aspects of Owen's socialism, based on current research in Japan.

Happiness-Seeking Utilitarianism

Owen's socialism is characterised by: (i) happiness-seeking utilitarianism, (ii) an emphasis on the potential for human development and the role of education based on environmental determinism, (iii) the critique of individualistic institutions that hinder happiness, (iv) scientism or empiricism. Let us begin with what is perhaps Owen's most famous statement on utilitarianism.

The end of government is to make the governed and the governors happy. That government, then, is the best, which in practice produces the greatest happiness to the greatest number; including those who govern, and those who obey (Owen, 1813-16/1993a, p. 77).

The "greatest happiness to the greatest number" is, of course, the criterion of right and wrong as formulated by the English legal philosopher Jeremy Bentham. After accepting this proposition, Owen adds three interpretations. First, there are "the governed and the governors" in society, and both should be made happy. Second, the social actors who realise happiness are "the governors". Finally, "the greatest number" refers to ninety-nine per cent of people, i.e., virtually all members of society.

Furthermore, the following words are found in *A New View of Society*.

That principle is *the happiness of self, clearly understood and uniformly practised; which can only be attained by conduct that must promote the happiness of the community* (Owen, 1813-16/1993a, p. 36)

That man is born with a desire to obtain happiness, which desire is the primary cause of all his actions, continues through life, and, in popular language, is called self-interest (Owen, 1813-16/1993a, p. 69).

The first thing to focus on is the “principle”. For deductive science, it is vital to stand on “universally revealed facts”, and the facts that “may be deemed fundamental” (Owen, 1813-16/1993a, p. 69) and require a “primary cause” to deduce human behaviour. In other words, the “desire to obtain happiness”, or “self-interest”. If it is obvious that human beings are born with the desire to pursue happiness, then all people should act based on self-interest, and social conditions should be created to enable people to act on the basis of self-interest. Individual happiness is said to be conditioned by the happiness of society, as it “*can only be attained by conduct that must promote the happiness of the community*”.

In addition, in *An explanation of the cause of the distress*, it is stated that:

The legitimate object of society is the improvement of the physical, moral, and intellectual character of man; and in the most convenient manner to supply all his wants, in order that he may experience the least suffering and the greatest enjoyment (Owen, 1821/1968, p. 92).

It is clear from this statement that the “the improvement of the physical, moral, and intellectual character of man” will only be achieved when every individual is able to pursue his or her self-interests, thus maximising their growth potential based on a method of utility calculation.

[T]hat the only solid foundation of public liberty is to be found in the full supply of the wants — in the virtuous habits — in the intelligence, and consequent happiness of the whole population (Owen, 1821/1968, p. 104).

This sentence also shows that the satisfaction of desire is the basis of “public liberty” and a condition for realising “happiness of the whole population”. In other words, for Owen’s socialism the satisfaction of individual needs is essential, but at the same time, it must not be in contradiction with the satisfaction of the needs of all members of society.

As will be seen, contrary to most images of socialism, Owenite socialism is based on the principle of utility, namely the pursuit of happiness. In economics, this term is also referred to as use value and is the principle and goal of socialism. However, under a capitalist market, utility cannot be maximised, contrary to the assumptions of economics, whose theories of utility maximisation remain a utopia, or a kind of religion that can never be secularised (Hodgson, 1999).

There is something of a misnomer in putting it this way. For the economists, utility maximisation refers merely to the result of the choice of given goods available to a rational economic actor. In contrast, Owen argues that the utility of goods available within an individualistic market is restricted from the outset. To avoid misunderstanding, we shall henceforth apply the term “substantiation of utility” when referring to Owen’s concept of utility.

Within the constraints of an individualistic market, for example, the choice between a meal that is tasty and one that is not, is dictated by price, so that the utility of each meal will be reflected in the price, and the individual social actor’s budget. In such conditions the relatively poor will be forced to choose the not so tasty meal to satisfy their hunger, while the relatively wealthy individual will be able to afford a tastier meal. Here freedom of consumer choice is restricted by income and the supply of good tasting meals is limited by scarcity. However, given the development of the productive forces and the level of scientific development since the Industrial Revolution, no such restrictions inherently arise. Rather, there is a glut of goods to be disposed of. Owen, therefore, questions the spectacle of a world where poverty prevails in the midst of plenty.

For Owen, therefore, the problem is not one of eliminating poverty through economic growth, which he regards as a false problem. Rather, the problem is how to enjoy abundant wealth. How can we ensure that everyone has a good meal, where no one’s choices are restricted by a lack of money? Here the pursuit of happiness is not resolved by focusing on the problem of choice, when the resources wasted in modern capitalism are so enormous that billionaires with the personal wealth of small nations sit side by side with poverty and hunger. In such a world there is no reason why people should be poor.

Therefore, despite the industrial revolution, the well-being of the whole of society, and the suffering of the working class cannot be eliminated as long as the individualistic market as a mechanism for distribution and adjustment remains intact. Owen's harsh criticism of economics lies in its failure to face this point, and in its fictional projection of an ideal of market efficiency onto the real workings of the market.

Political economists have hitherto totally misunderstood their subject. They have in all cases supposed that the sole object of society was the accumulation of riches, and that men would necessarily obtain all they required in proportion as their wealth increased. They have always reasoned as though man were an inanimate machine, without the capacity of suffering, understanding or enjoying, and have consequently recommended those measures, which were calculated to reduce the mass of mankind into mere implements of production and to deteriorate the general powers, physical and mental, of each individual, that some small part of his faculties might be unnaturally and most injuriously cultivated. Thus have they led the public, step by step, from one error to another, until at length they can proceed no farther, for the fact is become too evident, that men can easily produce more than they know how to distribute or consume advantageously. At this moment, the chief suffering of mankind arises from *an excess of wealth*, with, if the expression be allowable, *an excess of ignorance* (Owen, 1826-27/1993d, p. 77).

Political economists have assumed competition in the market, "the accumulation of riches", and the pursuit of utility which appears itself in the individual's profit and earnings; they have assumed that humans are "inanimate machine[s]" (utility calculators), and value them only as factors of production (labour). By making these assumptions they have inhibited the pursuit of happiness, precisely because the excess of wealth does not form a part of their calculations. For Owen, political economists simply do not "know how to distribute or consume advantageously".

Owen's reworking of the principle of utility is both thorough and original.

All things will be estimated by intrinsic worth, nothing will be esteemed merely for its cost or scarcity, and fashions of any kind will have no existence. With regard to dress, an object upon which so large a share of the industry of civilized states is now so uselessly and injuriously expended, the members of the community, having once ascertained the best materials and the form best adapted to the health of the wearer, will have no disposition to introduce afterwards any of the frivolous, fantastical and expensive varieties that may be current elsewhere. They adopt the rational course of employing the time which the manufacturer of such useless decorations would consume, in the pleasures of social intercourse, and intellectual pursuit, and in healthful recreations. They will well consider what will tend most to their permanent comfort, as respects food, clothing, dwellings and other objects (Owen, 1826-27/1993d, p. 70).

The first sentence calls for a change in the valuation criteria for things, arguing that they should be valued in terms of intrinsic value (amount of labour bestowed and utility) instead of cost (money price) and scarcity. Scarcity and utility are not alternative concepts, and the aim is to eliminate scarcity through the supply of plentiful utility while selecting technologies that minimise the amount of labour used in the production process (maximising leisure time). A universalist hope is then expressed that for any given good, such as clothing, there can be a good with the highest utility. Here the concept of utility discounts the fictional notion of variety and choice, which for Owen is a symptom of the wasteful diseases of civilisation caused by mass production and mass consumption driven by fashion. Rather the question of utility should focus on whether variety per se is really in the interests of the consumer; whether the social selection of goods with high utility in terms of health, pleasure and comfort is "the [more] rational course" (interestingly, Owen refused to stock anything that was faddish or that he deemed to be an "inferior article" in his factory stores).

There will be no inducement to raise or manufacture an inferior article, or to deteriorate by deceptive practices, any of the necessaries, comforts, or luxuries of life (Owen, 1821/1993b, p. 325).

In confronting the historical reality of capitalism and the failure of the market to co-ordinate people's interests, Owen challenged the prioritisation of profit when it came to the supply of inferior products or commodities, with no regard for the obstruction of the consumer's pursuit of benefits, or the

harm done to the health of the workers and their families. Even today, there is no end to false statements, disguised ingredients and places of origin, health hazards, and products that fail to take safety considerations into account. Owen's response was to improve the lives of workers and their families by eliminating adulteration and falsification and by encouraging cost-price selling. Thus, the co-operative movement, founded on Owenism, went beyond the selection of honest products and strengthened its commitment to the process of producing products.

It is worth noting in this context that Owen's utilitarian conception seems to have been inherited and shared by Marxism and other brands of socialism. The Marxist proposal of *sharing the means of production*, which is often trivialised by nationalisation despite the variety of forms such as workers' co-operatives, local governments, and communities, was intended to open channels for consumers to commit themselves to the production process and to ensure the substantiation of utility. The fact that Léon Walras, one of the founders of microeconomics, was a socialist also suggests an awareness of this point. It could even be argued that the reason why mainstream microeconomics today assumes that consumer utility can be maximised under a market economy without being hampered by the capitalist pursuit of profit is that it is based on a theory of markets in general, rather than a theory of capitalist markets.

Character Formation Theory

For Owen the utilitarian pursuit of happiness could only be achieved on the basis of two social conditions: an environmental approach to human development and the radical transformation of institutions that nurture individualistic behaviour. In the early nineteenth century, when Owen made his name as a factory manager, the working class was in a miserable state. It was common for them to go to work by the time they finished what is now called primary school. They had difficulties in acquiring basic literacy and numeracy (not to mention other subjects), had a short life expectancy, and were prone to heavy drinking, theft, poor hygiene, and other conditions endemically associated with poverty. For Owen, these "vices" of the workers' had nothing to do with the nature that they were born with. Rather, he argued that if workers were supposed to be human beings just like the educated upper classes, then they would need the same benefits. It was not birth, but environment which separated the respectable gentleman from a poverty-stricken wretch. Owen argued for the possibility of human development based on environmental determinism and emphasised the role of education. At the heart of Owen's thought, along with its utilitarianism, was a thoroughgoing critique of the ideology of self-responsibility, and its replacement by an "anti-responsibility theory" (Hijikata, 2003, p. 47), in which it is not the workers who are held responsible for their so-called "vices" and their poverty. Rather, it is the upper-class aristocrats, the parliamentarians, religious figures, academics, landlords, and capitalists who bear the responsibility for education and welfare of the workers.

Owen's *theory of character formation* is straightforwardly illustrated in the following propositions.

This error cannot much longer exist; for every day will make it more and more evident *that the character of man is, without a single exception, always formed for him; that it may be, and is, chiefly created by his predecessors; that they give him, or may give him, his ideas and habits, which are the powers that govern and direct his conduct. Man, therefore, never did, nor is it possible he ever can, form his own character* (Owen, 1813-16/1993a, p. 62).

The proposition that "*the character of man is, without a single exception, always formed for him*" does not, of course, mean that inborn differences and individuality are not recognised. Rather, it is a statement that people can change their character and grow by improving their environment, as opposed to the theory of self-responsibility, which can only be whipped by competition and by the stimulus of reward and punishment in the face of a working-class situation where ignorance and poverty prevent people from realising their innate potential.

This principle is that

Any general character, from the best to the worst, from the most ignorant to the most enlightened, may be given to any community, even to the world at large, by the application of proper means; which

means are to a great extent at the command and under the control of those who have influence in the affairs of men (Owen, 1813-16/1993a, p. 34).

However, Owen's scientism tended to invite universalist interpretations, as seen in the statement that "[a]ny general character ... may be given to any community ... by the application of proper means"; in other words, that scientifically proven propositions can be immediately generalised and applied to society. And it is only "those who have influence in the affairs of men" who can improve the various conditions of the working class (such as through changes to their life, work, and learning).

These arguments were a source of conflict between Owen and Owenites, not to mention Karl Marx and Friedrich Engels. While Owen's main supporters came from the working class who congregated in co-operatives and trade unions, rather than the upper classes, Owen himself doubted that "the governed" would solve their own problems.

Critique of the "Individual System"

Alongside his environmental theory of human development, Owen's theory of utilitarianism rested upon the radical transformation of the individualistic institutions that inhibited well-being. As previously discussed, Owen regarded the market as a failed institution which was unable to do the job of coordinating interests between individuals and was a block to the achievement of socialism. Without a radical change of system, most people would be unable to enjoy the fruits of the huge increase in the productive forces created under capitalism, with the net result of overproduction and a glut of commodities on the one hand, and the accumulation of poverty on the other. For Owen the critique of individualistic institutions that impede happiness was not restricted to commerce, money, and private ownership, but extended to marriage and religion. Socialism for Owen was based on what he regarded as a "social system" designed to replace the individual system that had manifestly failed. For example, he criticised the "commercial system" as follows:

The truth is, that a profit upon price can be obtained only, when the *demand is equal to, or exceeds, the supply*, while the real interest of society requires that the supply should, at all times, exceed the demand; and herein will be found the vast, the incalculable, advantage of general and united interest over individual and conflicting interest; inasmuch as supply cannot be permitted advantageously to exceed demand under the system of individual and opposing interest (Owen, 1821/1993b, pp. 94–95).

In other words, the common sense of business that we are all familiar with, makes no sense when judged against "*the real interest of society*". When judged socially, it is clear society has acquired the capacity to make more goods than it can sell, and reach a point where oversupply is possible, and competition superfluous. Furthermore, labour is wastefully diverted from the production of goods for human need to the production of commodities that will sell. Once the "*advantage of general and united interest*" is understood, a society with poverty in abundance should be transformed into a society that enjoys abundance.

Hence it follows, that the great mass of mankind can scarcely obtain the common necessities of life by severe, and oftentimes unhealthy and disagreeable labour, while, comparatively, very few procure a superfluity of luxuries, which are perhaps still more injurious to them.

Under this system the acquisition of *wealth*, and not *happiness*, is made the chief aim of society. It is therefore a system founded on error, and all its results are, and must be, misery (Owen, 1821/1968, p. 93).

Labour pains and poverty are unnecessary for socialism. Nevertheless, society continues to be sustained by the overwhelming *poverty of working people*: "[T]hat is, by the union and cooperation of ALL for the benefit of EACH" (Owen, 1826–27/1993d, p. 63). Thus, Owen's utilitarianism, his theory of character formation and the criticism of individual systems formed the cornerstones of his vision of a co-operative society that looks to the well-being of its members in the name of "the greatest happiness to the greatest number" and which ensures that the interests of the whole are not undermined by conflicts of private interest.

Scientism

Finally, there is the question of scientism, which holds that socialism must be founded on science. For Owen, the scientific method was necessary to convince people that socialism was not a utopia to be found in heaven or on some distant shore, but was rather sufficiently secular and realistic to be envisaged in its feasible forms. As can be seen from the repeated use of the term “principle”, it is clear that Owen was striving to ground his arguments in a deductive way, based on utilitarian propositions endorsed by the economists and philosophers of his time. “[T]hat with mathematical precision he *may* be surrounded with those circumstances which must gradually increase his happiness” (Owen, 1813-16/1993a, p. 38). Owen used the expression “mathematical precision” to emphasise the logical correctness of his views. It is also argued that political economy must be a science consistent with utilitarianism, “the science of human happiness” (Owen, 1826-27/1993d, p. 77).

However, without academic training Owen was at risk of playing on his opponents’ turf whenever he used methods such as deduction and mathematics. Therefore, Owen’s confidence was underpinned by his success as a factory manager, who improved the treatment of workers, encouraged their growth, and educated their children, and demonstrated that the factory management would benefit as well. Hence, Owen was confident in the use of positivist methods (data and evidence) acquired from his experience as a businessman. Indeed, his abundance of confidence is nowhere more on display than when he states “*that these principles have been carried most successfully into practice*” (Owen, 1813-16/1993a, p. 39).

Conclusion

Owen’s *science* is based first and foremost on the following theses: (i) The dramatic increase in productive forces due to the development of science renders unnecessary the suffering experienced by those who work under it; (ii) from the observed facts, it is possible to analyse the causes of social contradictions and conceptualise them in terms of the social environment in which the working masses are placed via a theory of character formation and a critique of individual institutions; (iii) that these arguments accord with values already acknowledged by the upper classes (utilitarian propositions and the scientific method of deduction); (iv) that science is a method applicable not only to production technology and economic analysis, but also to social design, which enables the development of a blueprint for a rational, scientifically feasible utopian society.

Owen’s direct appeal to observed facts reached the hearts and minds of many, and Owenism became a mass movement that shook society and stirred-up controversy among the upper classes. If nothing else, it could be said that Owen’s claim for a “utopia with science” had an impact. Even those who opposed Owenism could not deny its basis in facts and its utilitarianism. As for the latter, even for those Utilitarians who believed in the ideology of self-responsibility, and the benefits of competition in preventing the negligence of the workers, had no option but to praise Owen’s dedication to establishing national education by creating the world’s first primary schools. However, it can be said that Owen’s advocacy of the separation of church and state was met with stiff resistance from the Anglican Church, causing no small amount of unrest among Owenites. But this paled into insignificance against the severe criticisms that were ranged against his social designs, and especially against the opposition between a market society and the self-sufficiency of the community.

It would, however, be a mistake to ascribe Owenism exclusively to Owen himself. His dream of a future society captured a number of strands that were in development, and that were gradually setting society in motion and improving the condition of the working class. His achievement should not be thought of in terms of a successful capitalist who was able to utilise the competitiveness of the free market to achieve his ideals. Rather, by opposing the freedom of the market he reconstructed *society* in an attempt to regain human freedom, declaring “that I was entirely the child of Nature and Society” (Owen, 1857/1993c, p. 67). The essence of Owenism

is shown in these words. The thought of self-responsibility, in which one is not responsible for the lives of others, is a harsh but easy-going ideology. For Owen this falsified the goals of utilitarianism and the achievement of “the greatest happiness to the greatest number”, and had to be replaced with an infinitely more inclusive vision of society.

Finally, what does Owen’s utopia have to say to us today? It is the message that we should thoroughly pursue happiness (utility) and that the liberation of the productive forces allows us still to speak of a socialist utopia and to stress that capitalism continually fails to utilise the fruits of the Industrial Revolution. In the 160 plus years since Owen’s death, the productive forces have expanded far beyond what they were then. Nevertheless, the problems he pointed out have not only not been solved but have changed in form and become more serious. In poor and trapped conditions, it is difficult for people to feel secure and to be considerate of others. It is only when people are surrounded by a society based on abundance that they acquire the objective conditions to enable such solicitude.

Some of the most important benefits to be derived from the introduction of those principles into practice are, that they will create the most cogent reasons to induce each man ‘to have charity for all men’ (Owen, 1813-16/1993a, p. 41).

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