A Report on "The Mainstreaming of Marx: Measuring the Effect of the Russian Revolution on Karl Marx's Influence" by Magness and Makovi (2023)

Reviewer 2

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> I am wiser than this person; for it is likely that neither of us knows anything fine and good, but he thinks he knows something when he does not know it, whereas I, just as I do not know, do not think I know, either. I seem, then, to be wiser than him in this small way, at least: that what I do not know, I do not think I know, either.
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> Plato, *The Apology of Socrates*, 21d

> To err is human. All human knowledge is fallible and therefore uncertain. It follows that we must distinguish sharply between truth and certainty. That to err is human means not only that we must constantly struggle against error, but also that, even when we have taken the greatest care, we cannot be completely certain that we have not made a mistake.
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> Karl Popper, 'Knowledge and the Shaping of Reality'

Overview

Citation: Magness, P. W., and Makovi, M. (2023). The Mainstreaming of Marx: Measuring the Effect of the Russian Revolution on Karl Marx's Influence. *Journal of Political Economy*. Vol. 131, No. 6, pp. 1507–1540.

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Abstract Summary: The paper measures the effect of the 1917 Russian Revolution on Karl Marx's academic influence, hypothesizing that the political event, not scholarly merit, elevated him into the mainstream. Using the synthetic control method on Google Ngram data, the authors find a significant treatment effect, suggesting Marx's current academic stature owes a substantial debt to political happenstance.

Key Methodology: Synthetic Control Method (SCM) using Google Ngram and Newspapers.com citation data.

Research Question: Did the 1917 Russian Revolution elevate Karl Marx into the academic mainstream?

Summary

Is It Credible?

Magness and Makovi present a provocative quantitative history of ideas, arguing that the "mainstreaming" of Karl Marx was not a result of the intrinsic merit of his work, but rather a causal consequence of the 1917 Russian Revolution. Using the Synthetic Control Method (SCM) applied to Google Ngram data, the authors construct a counterfactual trajectory for Marx's citations based on a weighted composite of contemporary thinkers. They conclude that "Marx's academic stature today owes a substantial debt to political happenstance" (p. 1507), estimating that by 1932, Marx was cited approximately two to three times as often as he would have been without the Soviet rise to power (p. 1527). While the application of SCM to intellectual history is novel, the article's conclusions are weakened by a fundamental disconnect between the data used and the concepts claimed, as well as internal contradictions regarding the counterfactual control group.

The most significant limitation lies in the proxy used for "academic stature." The authors rely on Google Ngram data, which measures the frequency of text strings in a corpus of digitized books. However, frequency of mention is not synonymous with intellectual influence or academic acceptance. The authors acknowledge that the Soviet state became the "primary translator of Marx's works" and funded massive publication efforts (p. 1515). Consequently, the observed spike in Ngrams may simply reflect the logistical capacity of a state apparatus to print its founder's name, rather than a genuine shift in scholarly engagement. The article conflates the *availability* of Marx's name in print with his *acceptance* in the academy. A rise in mentions could equally represent a surge in anti-communist critiques or state propaganda, neither of which constitutes "mainstreaming" in the sense of intellectual legitimacy.

Furthermore, the construction of the synthetic counterfactual is methodologically

precarious. The authors hypothesize that the Soviet embrace of Marx "crowded out other socialist traditions" (p. 1515). Yet, their primary synthetic control for Marx is composed almost entirely (93%) of these very socialist competitors, such as Ferdinand Lassalle and Johann Karl Rodbertus (p. 1528). If the Russian Revolution actively suppressed the popularity of these control units—a "spillover effect" the authors admit is a risk—then the synthetic counterfactual would artificially flatline or decline (p. A20). This would mechanically generate a positive treatment effect for Marx even if his own popularity had merely remained stable. By choosing a control group that they argue was negatively impacted by the treatment, the authors likely inflate the estimated causal effect.

Finally, the robustness of the model is questionable. The authors note that the pre-treatment fit degrades after 1905, suggesting the "dress rehearsal" revolution contaminated the baseline (p. A25). More concerning is the instability of the donor pool; a robustness check changing the search term from "Karl Marx" to "Marx" results in a synthetic control composed primarily of Friedrich Nietzsche and Abraham Lincoln, rather than fellow socialists (p. A31). This sensitivity suggests the model may be engaging in mathematical pattern-matching rather than identifying a substantively valid historical counterfactual. While the correlation between the Soviet rise and Marx's visibility is clear, the claim that this event conferred "academic stature" remains unproven by the metric of simple citation frequency.

The Bottom Line

Magness and Makovi demonstrate a clear divergence in print frequency between Karl Marx and his socialist contemporaries following the Russian Revolution. However, the claim that this represents a rise in "academic stature" is undermined by the use of Ngram data, which captures propaganda and criticism as easily as scholarly influence. Furthermore, the reliance on socialist control units that were likely

suppressed by the Revolution creates a methodological artifact that may exaggerate the magnitude of the effect. The article successfully quantifies Marx's increased visibility but does not definitively prove this translated into intellectual legitimacy.

Potential Issues

Equivocation between N-gram frequency and scholarly influence: The article's central claim about Karl Marx's "academic stature" and "scholarly influence" rests on a single proxy: the frequency of his name's appearance in the Google Ngram corpus (p. 1524). This measure, however, does not directly capture scholarly reception or intellectual prestige. An increase in mentions within a vast collection of digitized books, which includes non-academic works, does not distinguish between positive intellectual engagement, critical dismissal, or simple historical contextualization. The article consistently uses terms like "academic stature," "scholarly influence," and "mainstreaming" to describe what is, fundamentally, a measure of print frequency. The authors acknowledge some limitations of Ngram data, noting that it only approximates references and is subject to biases in the composition of the underlying corpus (pp. 1509, 1526). However, the conceptual gap between "frequency of mentions" and "scholarly influence" remains a foundational challenge to the article's interpretation. This is compounded by the fact that a key mechanism of the proposed treatment—the Soviet state's creation of institutions like Progress Publishers to translate and disseminate Marx's works—directly increases the volume of printed material containing Marx's name, potentially contaminating the outcome measure with the mechanism of the treatment itself (p. 1515). The article may therefore be measuring the success of a state-sponsored publication campaign rather than a more organic shift in intellectual influence.

Violation of the stable unit treatment value assumption: The synthetic control method (SCM) requires that the treatment applied to the subject of interest (Marx) does not affect the control units used to construct the counterfactual. The article's own theoretical argument appears to violate this assumption. The authors hypothesize that "the Soviet embrace of Marx not only elevated Marx absolutely but also crowded out other socialist traditions" (p. 1515). Yet, the synthetic counterfactual for

Marx is overwhelmingly constructed from these very socialist thinkers who were allegedly "crowded out." The primary model's synthetic Marx is composed of 52.0% Ferdinand Lassalle and 28.8% Johann Karl Rodbertus, with socialists contributing 93.0% of the total weight (p. 1528). If the Russian Revolution suppressed the citation frequency of these key donors, then the counterfactual trajectory is artificially depressed, which would mechanically inflate the estimated treatment effect for Marx. The authors explicitly acknowledge this potential violation of the Stable Unit Treatment Value Assumption (SUTVA) in the appendix, describing it as a risk of "displacement" or "spillover effects" (p. A20). To address this, they perform a robustness check by re-running the analysis using only non-socialist authors in the donor pool, finding that a significant treatment effect remains (p. A21). While this check provides important corroborating evidence, the article's main reported result is derived from a model where the control group is, by the article's own logic, likely contaminated by the treatment.

Exclusion of other Marxist thinkers and its interpretive consequences: The article excludes prominent contemporary Marxist thinkers, such as Karl Kautsky and Rosa Luxemburg, from the donor pool. The justification is that these figures also saw an increase in mentions after 1917, and their inclusion would therefore introduce post-treatment bias (p. A11). While this decision is methodologically defensible under the rules of SCM to avoid spillover effects, it has a significant consequence for the interpretation of the findings. The fact that Marx's closest intellectual peers experienced a similar trajectory suggests the treatment effect may have been on "Marxism" as a school of thought, rather than uniquely on "Karl Marx" as an individual. By excluding the most relevant comparators precisely because they were also affected by the treatment, the article cannot distinguish between these two possibilities. This design choice narrows the research question and may lead to attributing a unique "mainstreaming" effect to Marx that was, in fact, a broader phenomenon affecting the entire Marxist movement.

Contamination of the pre-treatment period: A core assumption of SCM is that the pre-treatment period provides a clean baseline where the synthetic control can accurately track the treated unit. This assumption appears to be violated by the 1905 Russian Revolution. The authors' own analyses reveal a "concerning lack of fit from 1905 onward" in a cross-validation test and find "a statistically significant treatment effect" when 1905 is modeled as the intervention year (pp. A25, A44). This indicates that the pre-treatment period used for the main analysis (1878–1916) was contaminated by an earlier, related political shock that caused Marx's citation trend to diverge from his synthetic counterpart for over a decade before the 1917 treatment. The authors acknowledge this issue and argue that the effect of the 1905 revolution was "fleeting" and had dissipated by 1916 (p. A44). However, the sustained divergence in pre-treatment trends raises questions about the validity of the counterfactual and the model's ability to isolate the effect of the 1917 event.

Instability of the synthetic control model: The article's application of SCM appears to be sensitive to minor specification changes, raising concerns about the robustness of the findings. In a key robustness check, the authors change the outcome variable from the two-word phrase "Karl Marx" to the single word "Marx." This minor alteration causes the model to produce a completely different and theoretically implausible synthetic control, composed primarily of Friedrich Nietzsche (37.1%), Abraham Lincoln (29.0%), and Lord Kelvin (20.8%), with almost no weight on other socialists (p. A31). The authors transparently report this result and correctly identify it as a failure of the model to achieve "adequate indicator balance" for that specific test (p. A29). While they argue this failure does not impugn their primary result, the model's instability is notable. That a small change in the search term causes the algorithm to abandon Marx's intellectual peers in favor of a disparate group of thinkers suggests the primary result may be fragile and that the SCM is engaged in a pattern-matching exercise that may lack substantive validity.

Disconnect between evidence period and scope of conclusion: The article's empiri-

cal analysis is primarily limited to the period 1917–1932, a cutoff the authors justify in order to "avoid confounding treatments, such as the diaspora of Marxist intellectuals during the Nazi era and World War II" (p. 1509, footnote 3). Despite this limited evidentiary window, the article's central claims are framed in terms of Marx's influence in the present day. The abstract asserts that "Marx's academic stature today owes a substantial debt to political happenstance," and the conclusion discusses "Marx's academic influence in the present day" (pp. 1507, 1539). This represents a significant temporal extrapolation. The authors do present a graph extending to 2019 and explicitly "caution readers against making strong inferences from the lengthy extrapolations" (p. A14). Nonetheless, a tension exists between the methodological caveats and the broad framing of the article's main claims, which infer a direct causal link from a short-term boost in the early 20th century to his status nearly a century later.

Under-interpretation of null findings in non-English corpora: The article finds no statistically significant effect of the 1917 Revolution on Marx's mentions in either French-language ($p = 0.605$) or Spanish-language ($p = 0.412$) texts (pp. 1537, A43). These null findings represent important boundary conditions on the article's central thesis, but they are not fully integrated into the main conclusion. The authors offer plausible, but post-hoc and untestable, historical narratives to explain these results, suggesting that pre-existing socialist traditions in France may have blunted the impact of the Revolution, and that Marx's influence may have arrived later in the Spanish-speaking world (pp. 1536, A41). While these explanations are reasonable, the article does not sufficiently consider the alternative possibility that the null findings point to limitations in the generalizability of the main result or potential methodological issues with the non-English Ngram corpora.

Interpretation of German-language results: The analysis of German-language texts is extended to 1950, and the authors note that Marx's citation frequency plummets after the Nazi seizure of power in 1933 and rebounds after the establishment of East Germany in 1945 (pp. 1533–1534). The authors interpret these events as "additional

treatment effects" that support their broader thesis that political events shape citation patterns. While this interpretation is consistent, the article also reports aggregate p-values for the entire 1878–1950 period (p. 1535). Reporting a single p-value for a period containing multiple, opposing treatments is potentially misleading, as it is unclear what hypothesis such a test is evaluating. The post-1933 data cannot be validly interpreted as a continued test of the 1917 treatment effect.

Minor calculation error: A minor calculation error appears in the summary statistics of Table A.1 (p. A15). The table reports the average percentage difference for the post-treatment period (1917–1932) as 82.267%. However, the arithmetic mean of the 16 annual values provided in that same column is approximately 83.16%. This small discrepancy does not alter the substantive conclusions of the article but represents a clerical error in the presentation of the results.

Future Research

Distinguishing citation sentiment: Future work should move beyond raw frequency counts to analyze the context of citations. Using sentiment analysis or topic modeling on a corpus of academic journals (rather than all books) would allow researchers to distinguish between state-sponsored propaganda, hostile critiques, and genuine positive engagement. This would provide a more accurate measure of "academic stature" versus mere notoriety.

Alternative control groups: To address the violation of the stable unit treatment value assumption, researchers could construct a synthetic control using only authors who were theoretically insulated from the "crowding out" effect of the Soviet Union. While the authors attempted a non-socialist robustness check, a more rigorous approach would involve selecting donors based on pre-treatment intellectual similarity (e.g., non-Marxist sociologists or philosophers) who were not direct political competitors, ensuring the counterfactual represents a neutral baseline.

Granular institutional analysis: Future research could investigate the mechanism of "mainstreaming" by tracking syllabus inclusion or dissertation citations in the decades immediately following 1917. Moving away from aggregate Ngrams to specific university archives would help determine if the increase in printed mentions actually correlated with an increase in Marx being taught as a foundational theorist in Western universities, or if that phenomenon occurred much later.

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